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OPERATORS' GUIDE
MEDICAL EXAM SCHEDULING MODULE

Richard H. Fiddleman
Marianne Follingstad

The MITRE Corporation
January 16, 1987

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16. Abstract (Limit: 200 words) <p>The Medical Examination Scheduling (MES) module consists of a list of options that allow users to access the Navy Occupational Health Information Management System (NOHIMS) Industrial Hygiene (IH) Component database in order to perform these functions:</p> <ul style="list-style-type: none"> ➤ (1) enroll and remove employees from Medical Programs manually, (2) schedule employees for examinations for Medical Programs, (3) maintain medical qualifications for employees. <p>The System automatically enrolls employees for occupationally required programs and automatically removes them if terminated, program is deleted from occupational requirements, they have missed an excessive number of examinations.</p> <p>This manual describes how to use MES options to enter or retrieve data. <i>Keywords: management information systems, occupational diseases, physical exams, medical examinations, health survey, military medicine, industrial medicine. (STW)</i></p>							
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OPERATORS' GUIDE

MEDICAL EXAM SCHEDULING MODULE

1.0 BACKGROUND

1.1 Purpose of the Operators' Guide

This guide explains how a user interacts with the Medical Exam Scheduling (MES) module of the Navy Medical Command's (NAVMED) Navy Occupational Health Information Management System (NOHIMS). After presenting an overview of the module and its files, this guide describes the module's menus and discusses the individual options highlighting significant aspects. The information in this document is intended to help the reader effectively use this module.

This module extensively uses the VA FileMan data base management package. The NOHIMS Primer (the Primer) explains the general principles involved in using FileMan and also explains how one uses system-wide functions. This guide assumes that the reader has carefully reviewed the NOHIMS Primer before this document is read or used.

1.2 References

The following publications provide background information on the Medical Exam Scheduling module:

- o NOHIMS Medical Exam Scheduling Module Functional Design Specifications
- o Navy Occupational Safety and Health (NAVOSH) Program Manual, OPNAV Instruction 5100.23B
- o Department of Defense Occupational Health Surveillance Manual, DoD 6055.5-M
- o NOHIMS Primer, The MITRE Corporation, January 1987
- o Users' Manual Medical Exam Scheduling Module, The MITRE Corporation, January 1987

1.3 Terms and Abbreviations

The following terms and abbreviations are used in this guide:

- o Agency: An Executive Department, as defined in 5 U.S.C. 101, or any

employing unit or authority of the Government of the United States not within an Executive Department to which the provisions of Executive Order 12196 are applicable.

- o Automated Scheduling System: Indicates that all appointments are filed into a schedule of dates and time slots. Each time slot included in an appointment is checked by the system for available capacity and for shift or program preferences.
- o Date Next Exam: For periodic program enrollments, this indicates the date by which the employee is expected to be scheduled for an exam. For one-time enrollments or for removed programs, this indicates the month and year in which the one-time or removal exam should be given.
- o Disposition: A determination of whether an appointment was attended, missed, or cancelled.
- o Expiration Date: The date on which an employee's periodic program qualification expires. As adjusted by the clinic specified Qualification Grace Period, it is the program enrollment Date Next Exam or a scheduled appointment date, whichever is later.
- o Location: A four-tiered description of a physical place consisting of site, location, sublocation, and area.
- o Manual Scheduling System: Indicates that all appointments will be scheduled by the user with no system scheduling or checking on clinic availability.
- o One-time: A program exam or enrollment that does not anticipate or require any periodic reexamination.
- o Operation: A defined set of procedures, each with its own code, that is used to classify specific tasks performed by employees in the course of their work.
- o Periodic: A program exam or enrollment indicating need for regular medical surveillance at the interval specified by the reexamination frequency. The exam results for these programs determine an employee's medical qualification status for related occupations, operations, locations, and stressors.
- o Program: A means of classifying employees for medical surveillance that specifies the medical protocol an employee should be subject to when working in an occupation, location, operation, or with a stressor, or when requiring evaluation based on past exposure to a stressor. Programs may be generic or specific to a stressor, operation, or occupation (e.g., sight conservation, asbestos, fork lift operator).

- o Program Preference: A medical program that is to be given preferential treatment in scheduling during specified time periods, e.g., an exam needing the presence of a special practitioner who is available one morning each week.
- o Protocol: The list of medical history items, physical examinations, and lab tests that an employee should be given during an examination for a medical program.
- o Stressor: Any chemical substance, biological agent (bacteria, virus, fungus, etc.), or physical stress, noise, heat, cold, hypo-hyperbaric pressure, etc., which is:
 1. Regulated by any NAVOSH Standard or Federal Law or rule due to a hazard to health
 2. Listed in the latest printed edition of the National Institute for Occupational Safety and Health (NIOSH) Registry of Toxic Effects of Chemicals
- o To Be Scheduled (TBS): A file of employee programs that await immediate scheduling by the clinic.

1.4 How to Use This Guide

This guide describes how to execute the module's various menu options. Section 2 contains an overview description of the module; this information should help the user determine if the system activities he or she wishes to perform are performed by this module. Section 3 presents an overview of the module's menus; this information is intended to help the user identify which of the menu options should be used (Section 2 of the NOHIMS Primer explains the mechanics of selecting menu options).

For ease and clarity of discussion, the module's menu options have been grouped into processes, where each process deals with a major feature of the module. Usually, the process is further broken down into various input and output subprocesses. Each section after Section 3 describes a specific process. Each of these sections begins with a discussion of the major points that must be known to use the process effectively. If the process has been broken into subprocesses, a brief discussion of the highlights of each subprocess is then presented. In most cases, for each subprocess an actual prompt sequence is shown; notes are keyed to selected prompts. These notes present especially important information about the responses to these prompts. Messages and prompts shown in the figures that are displayed by the system are without underline; responses by the user are underlined. If the response to a prompt is straightforward, there is no accompanying note; the user should be able to understand how to respond to the prompt by using the

Help message feature of FileMan. To understand prompts and prompt responses fully, the user must first read Sections 3 through 10 of the NOHIMS Primer.

In an attempt to keep the Operators' Guide as short as possible, most of the general information about the module (such as the contents of input forms and output reports) that was presented in the module's Users' Manual has been excluded from the Operators' Guide. If the user wishes to review the material in the Users' Manual while using the Operators' Guide, he or she should consult the Medical Exam Scheduling Module Operators' Guide/Users' Manual Cross Reference (Table 1-1) to determine quickly which portion of the Users' Manual should be read.

It is important to recognize that the Operators' Guide is not organized by menu option; rather, it is organized by process. Frequently, a user will not wish to review the material that describes how to perform a process. Instead, the user will wish to review the material that deals directly with a specific menu option. When this situation occurs, the user can locate the desired section by either reviewing the Index in the back of this document or locating the appropriate menu option in the table appearing in Section 3. In the latter case, this specific section number that describes how to use the option appears in parenthesis after the option's name.

TABLE 1-1
MEDICAL EXAM SCHEDULING MODULE
OPERATORS' GUIDE/USERS' MANUAL CROSS REFERENCE

Operators' Guide	Users' Manual
1.1 Purpose of the Operators' Guide	1.1 Purpose of the Manual
1.2 References	1.2 References
1.3 Terms and Abbreviations	1.3 Terms and Abbreviations
1.4 How to Use This Guide	---
2.1 Module Summary	1.4 Medical Exam Scheduling Module Overview
2.2 Module Data Base	2.3 System Data Base
3.0 Module Menus	---
4.1 Introduction (Maintain Enrollment Status Process)	3.3 Maintain Enrollment Status
4.2 Enrollment into Medical Programs Option	3.3 Maintain Enrollment Status
4.3 Remove Employee from Medical Programs Option	3.3 Maintain Enrollment Status
4.4 Maintain Enrollment Status Output Options	4.2 Produce Management Reports 4.4 Produce Discrepancy Reports 4.5 Produce Program Link- age Displays
5.1 Introduction (Scheduling Process)	3.4 Schedule Appointments
5.2 Enter/Edit Employees To Be Scheduled Option	3.4 Schedule Appointments
5.3 Generate Clinic Monthly Template Option	3.4 Schedule Appointments

TABLE 1-1
MEDICAL EXAM SCHEDULING MODULE
OPERATORS' GUIDE/USERS' MANUAL CROSS REFERENCE
(Concluded)

Operators' Guide	Users' Manual
5.4 Direct Appointment Scheduling/ Rescheduling Option	3.4 Schedule Appointments
5.5 Schedule Appointments from To Be Scheduled Option	3.4 Schedule Appointments
5.6 Monthly Automated Scheduling Option	3.4 Schedule Appointments
5.7 Monthly Schedule Kill and TBS Refile Option	3.4 Schedule Appointments
5.8 Scheduling Output Options	4.3 Produce Clinic Reports
6.1 Introduction (Update Appointment History Process)	3.5 Update Appointment History
6.2 Cancel Individual Medical Appointments Option	3.5 Update Appointment History
6.3 Block Cancellation of Medical Appointments Option	3.5 Update Appointment History
6.4 Missed Appointments Option	3.5 Update Appointment History
6.5 Record Attended Appointments Option	3.5 Update Appointment History
6.6 Exam Results Entry/Edit Option	3.5 Update Appointment History
6.7 Update Appointment History Output Options	4.2 Produce Management Reports

2.0 MODULE OVERVIEW

2.1 Module Summary

The Medical Exam Scheduling module tracks employee medical surveillance program exam requirements and medical qualification statuses, supports automatic or manual clinic scheduling with appointment notification and exam protocol generation, and provides data for monitoring employee's exam histories. Figure 2-1 shows the major processes, inputs, and outputs of the module.

The primary function of this module is to ensure that employees receive necessary medical surveillance. To accomplish this, the system relies on medical surveillance program enrollment, scheduling, and qualification tracking. Figure 2-2 illustrates the general flow of employee medical program data in this module.

The module first enables the user to establish medical surveillance programs and associated medical exam protocols that are linked by the user to appropriate locations, stressors, occupations, and operations. Employees in an occupation that is linked to medical programs are automatically enrolled in the programs for periodic surveillance, and the newly required programs are filed in the To Be Scheduled file. An employee who is overexposed or over the medical surveillance action level for a stressor may be enrolled for a future one-time checkup or have an entry filed in the To Be Scheduled file for all programs linked to the stressor, depending on the monitoring recommended for that stressor. To supplement these automatic "required" occupation and "personal" exposure enrollments, the user can enroll employees into medical programs for "job-related" (operation, location) or other "personal" reasons. Enrollment is generally for periodic programs with annual, semiannual, or other frequencies, but it can also be used to ensure that a one-time exam is conducted in the future.

Employees are automatically removed from enrollment in programs when they are terminated, when a program is deleted from their occupation requirements, when the system determines that they have missed an excessive number of consecutive exams, or, for one-time enrollments, when the program is moved to the To Be Scheduled file. The user can also remove an enrollment directly, at which time the user specifies whether or not a removal exam is to be performed either now or in the future. Once a month the clinic will have the system review all employee records and identify those employees having one-time or periodic program enrollments that need a baseline, periodic, or removal exam in the specified month. These programs are filed in the To Be Scheduled file.

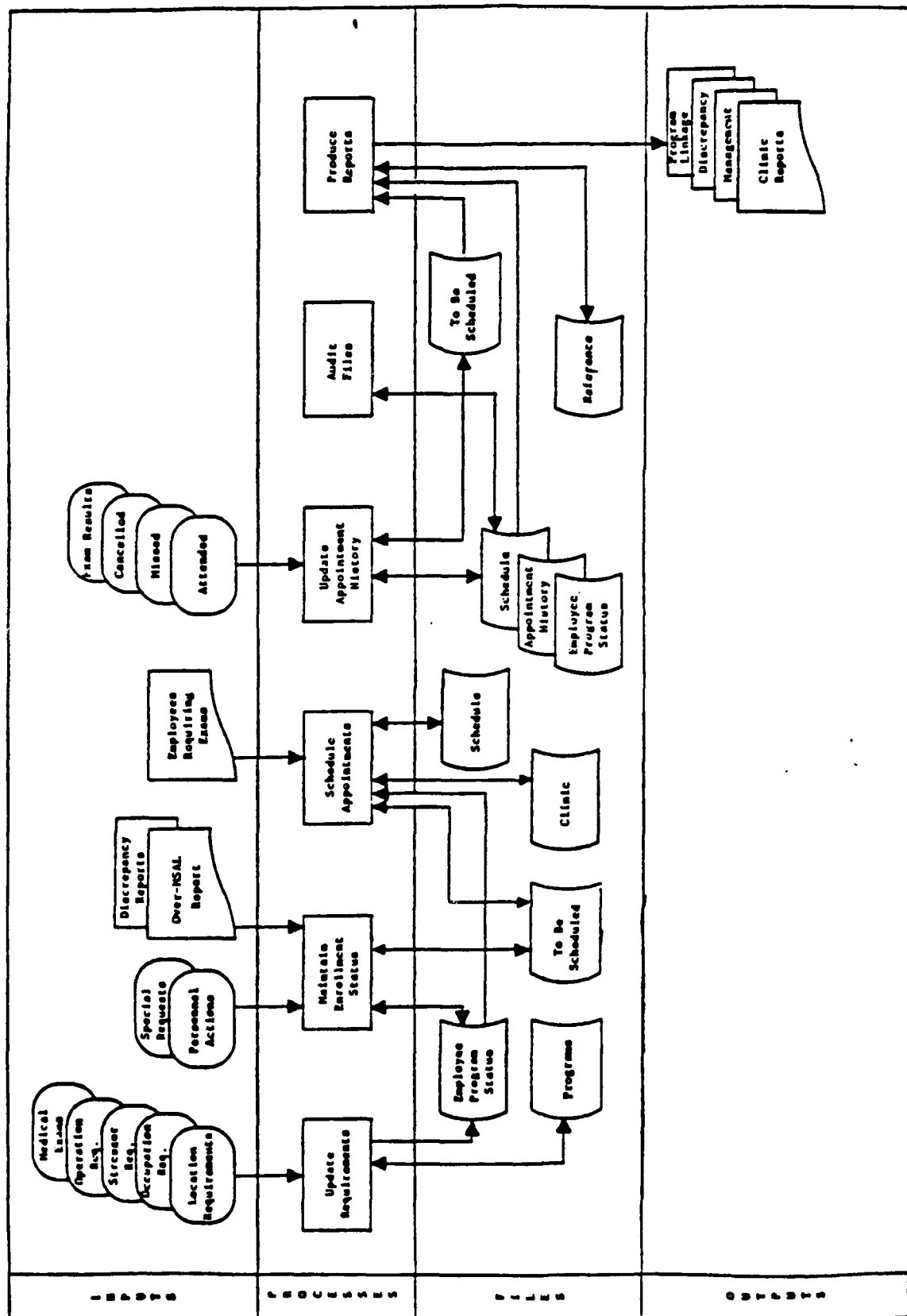


FIGURE 2
OVERVIEW OF MEDICAL EXAM SCHEDULING MODULE

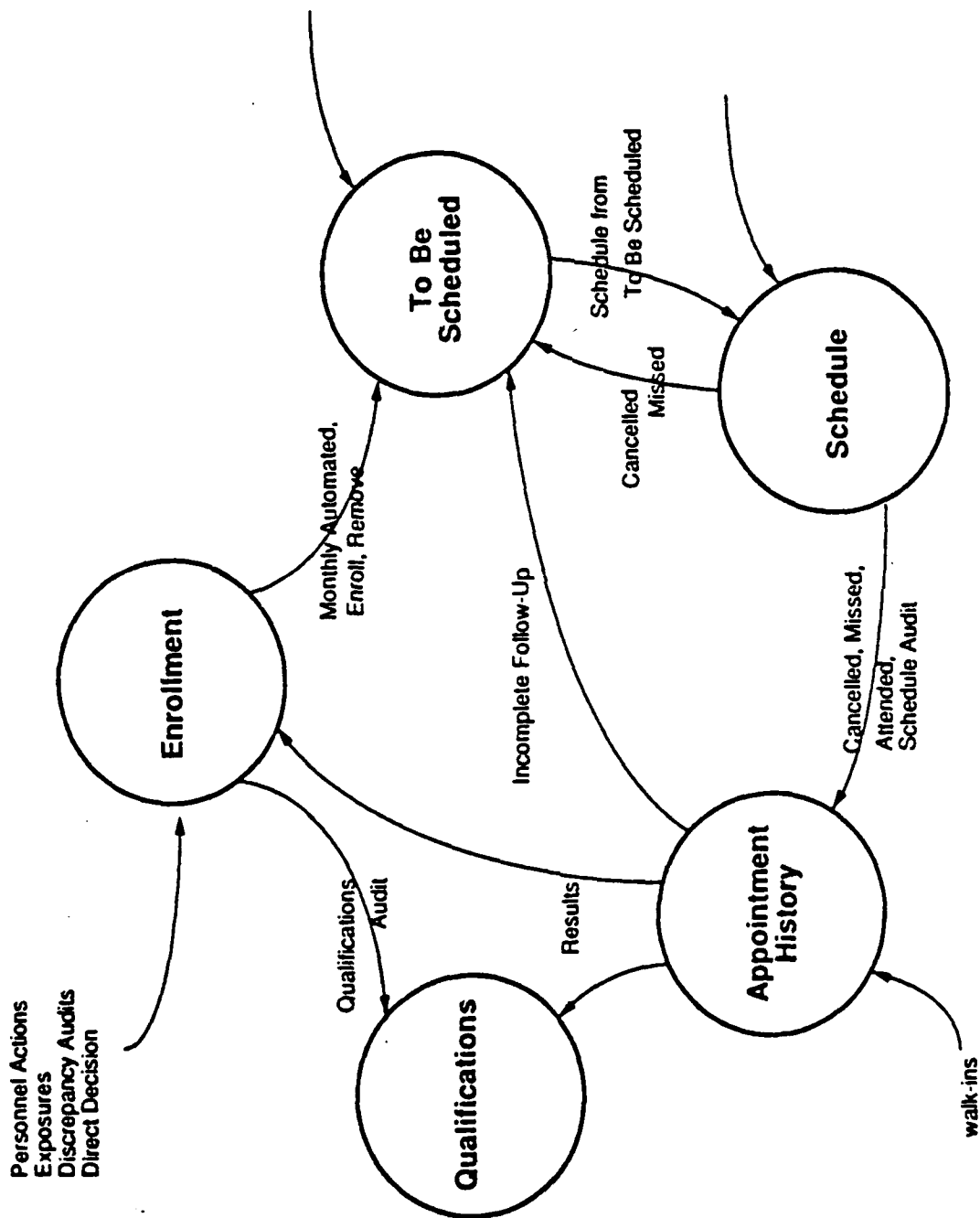


FIGURE 2-2
MEDICAL EXAM SCHEDULING
DATA CYCLE

Under the scheduling part of the system, each clinic will have the choice of a manual scheduling system or an automated scheduling system. Under either system, the user can at any time schedule or reschedule appointments directly and either incorporate programs that are in the To Be Scheduled file or enter other desired program data. In addition, under an automated scheduling system, the user can have the system schedule appointments for programs that need to be scheduled, or the user can have the system list the employees and programs that need to be scheduled and list blank time slots that are available by shop for scheduling. In the latter case, the shops will use the employee lists to assign appointments, and the clinic will enter the appointments directly. The system will distribute a shop's appointments or blank time slots over several days. System scheduling can be run more than once a month, if desired.

Under an automated scheduling system, the user can specify holidays, administrative time, availability of time slots, time slot length, and preference for seeing employees from a specific shift or program at specific dates and times.

Whenever an appointment date, time, or program has been assigned or changed, the system prints out an appointment notice addressed to the employee, listing the appointment date and time, medical programs covered by the appointment, and any preexamination instructions that the employee should follow prior to the appointment. The clinic can, for a specific day or appointment, print individual appointment exam protocols that list exposure data, the employee's enrollments, the appointment programs and the medical history, physical exams, and lab tests appropriate to the employee's age and sex for the medical programs specified in the appointment. The physician will use this report to record program exam results of "qualified," "not qualified," or "incomplete." The clinic will enter missed, cancelled, or attended appointments directly or will flag an existing scheduled appointment as missed, cancelled, or attended. For cancelled or missed appointments, the clinic will be able to reschedule the appointment directly or file the programs in the To Be Scheduled file. For attended appointments, the clinic can add information on the employee's arrival and departure time and can enter program exam results as they become available.

The system also tracks the medical qualification of each employee. When a user records an appointment as attended, a qualification of "pending" is filed in the employee record for each program covered by the appointment. When a program result is entered as "incomplete," the employee program qualification status is left as "pending," and the program is filed in the To Be Scheduled file for a follow-up exam. When results of "qualified" or "not qualified" are entered in the appointment

history, the system also files them in the employee's program qualifications and increments the qualification expiration date by the reexamination frequency. For medical surveillance programs in which an employee is enrolled for periodic reexamination, the system will file a "not qualified" if the qualification expiration date is past. The system generates a regular report on employee qualifications, and the user may request a special report at any time.

2.2 Module Data Base

There are two types of files in NOHIMS:

- o Application files--These files are primarily intended to support the functions of a specific module, although in certain cases they may be used by other modules. In addition, the contents of these files change frequently as new data is added to the files or old data is removed from these files.
- o Reference files--These files are primarily intended to be used by a specific module, although in certain cases they may also be used by more than one module. These files differ from application files in that they contain controlled vocabularies of terms. The contents of these files are usually static or change slowly over time.

The MES Module uses the following files listed under their associated type:

Application Files

Clinic
Medical Program
Enrollment
To Be Scheduled
Medical Appointment
Medical Appointment History
Medical Qualifications

Reference Files

Appointment Notices
Preexam Instructions
Medical Program Tests

The Clinic file identifies the clinics using the system, provides the clinic-specific grace periods, and holds data on the type of scheduling system used by each clinic. For a clinic with an automated scheduling system, the entry contains program preferences, time slot length, clinic start and stop times, and the generic weekly schedule used by the system to build monthly templates. The Identification (ID) field for a Clinic entry is the Clinic Name. The lookup fields are the Clinic Name and Clinic Abbreviation. See the System Manager's Guide for further information on Clinic entries.

A Medical Program file entry identifies a medical surveillance program and contains data on valid reexamination frequencies, exam protocols, preexam instructions, estimated exam length, and links to related occupations, stressors, operations, and locations. The ID field is the Name. The lookup fields are the Name and Program Code. See the System Manager's Guide for further information on Medical Program entries.

The Enrollment file contains data on programs in which an employee is or has been enrolled. The file is a subfile in the Employee file. For each employee record, there are multiple programs referenced. The data consists of the most recent enrollment and removal for each program, including information concerning the next examination needed. There are two kinds of enrollments--periodic and one-time. A one-time enrollment is used to ensure that an employee will be examined before a specified date. One-time enrollments are automatically removed by the system as soon as the program is filed in the To Be Scheduled file. The system may generate one-time enrollments as a result of an employee's exposure to a stressor. The system will generate periodic required enrollments with a Date Next Exam of the current date when an employee's occupation is entered or changed or when the required programs for an occupation are changed.

The To Be Scheduled file consists of programs for which an employee is to be scheduled. This file is a subfile of the Employee file, with multiple programs referenced. Each program entry contains information needed to schedule the program. This file serves as a holding area for employees with programs that await immediate scheduling by the clinic. The bulk of the file entries will be the result of one of the following actions:

- o Operator or system entry of an enrollment with a Date Next Exam in the current month. The system's entries will arise primarily in response to changes in an employee's occupation or occupation requirements as discussed above.
- o Compilation of an Over MSAL Report, under the Exposure module, that identifies either an employee's overexposure to a stressor or exposure over the medical surveillance action level (MSAL) to a stressor requiring mandatory monitoring, whether or not the employee is enrolled in the stressor-related programs.
- o Initiation of the monthly selection process which identified any programs with a Date Next Exam in the month to be selected.

- o Operator entry of a scheduled appointment as missed or cancelled with the appointment to be rescheduled at an unspecified date and time.
- o Operator entry of an employee's program exam status as "incomplete." This will result in a follow-up entry.

Entries in this file will be deleted as they are scheduled for appointments either by the user or by the system.

A Medical Appointment file entry identifies an employee and the programs covered by the appointment. The ID field is the Employee Scheduled (which references the Employee file).

The Medical Appointment History file contains data on all cancelled, missed, and attended appointments, and the program exam results. The ID field is the Date of Exam/Appointment.

The Medical Qualification file contains any programs for which an exam result or qualification status has been filed. For each program there are multiple dates with the status associated with each date. the file is a subfile of the Employee file, with multiple programs.

The Reference files are summarized in Table 2-1. The Appointment Notices file ID field is Code. There is only one Appointment Notice entry used by the system. For the Preexam Instructions file, the ID field is Name. The Medical Program Tests file uses Test Number for the ID field.

This module also uses files that were created and previously used by other modules. These files are used as reference files in that they contain a controlled vocabulary of terms, but in certain situations, they also serve as application files in that their contents may be updated by the user. These files and the modules that primarily create and maintain them are listed below:

- o Administration Module
 - Agency Unit
 - Employee
 - Location
 - Operation
 - Occupation
 - Stressor

TABLE 2-1
MEDICAL EXAM SCHEDULING REFERENCE FILES

FILE NAME	FILE CONTENTS
Appointment Notices File	The appointment notice format specifying the test and the data items to be inserted from the Employee, Medical Appointment, and Preexam Instruction files.
Preexam Instructions File	Categories of instructions to appear on the employees' appointment notices.
Medical Program Tests	The full exam protocol stored in hierarchical structure. Each item has a name, number, and an ascendant entry under which it is always listed.

3.0 MODULE MENUS

The Medical Exam Scheduling module is divided into six subject areas as follows:

- o Enrollment--These options directly affect employee enrollment in medical surveillance programs. They include the Enrollment into Medical Programs option and the Remove Employees from Medical Programs option.
- o Scheduling--The Schedule Medical Appointments options, Appointment Notices and Medical Exam Protocols options, and Print Current Appointment Schedule options allow you to handle all aspects of appointment scheduling. The options relating to Appointment Notices are discussed in the System Manager's Guide.
- o Appointment History--The options for Record Attended Appointments, Exam Results Entry/Edit, Cancel Medical Appointments, and Missed Appointments allow you to enter and edit all Appointment History data and modify employee enrollment qualification data.
- o Medical Tables and Program/Test Linkages--You will use these options to display program linkages and exam protocols. The System Manager's Guide discusses the options that modify program linkages and edit the major module tables. The options that display program linkages are related to the Maintain Enrollment Status process.
- o Medical Exam Reports--These options enable you to produce reports on enrollment, qualifications, appointment histories, and program/operation links. The Removal Report, Program List per Operation by Shop, Program History, and Report of Date Next/Birth Month Discrepancies relate to the Maintain Enrollment Status Process. The rest of the reports are related to the Update Appointment History process.
- o Medical Audit Functions--These options audit the module's files. They are discussed in the System Manager's Guide.

The structure of the menus and the options discussed in Sections 4, 5, and 6 are shown in Table 3-1.

TABLE 3-1
MEDICAL EXAM SCHEDULING MENU OPTIONS

1. Enrollment into Medical Programs (4.2)
2. Schedule Medical Appointments
 - 1 Enter/Edit Employees To Be Scheduled (5.2)
 - 2 Display/Print Personnel Requiring Exams (5.8)
 - 3 Manual Appointment Scheduling
 1. Schedule Appointments from To Be Scheduled (5.5)
 2. Direct Appointment Scheduling/Rescheduling (5.4)
 - 4 Automated Scheduling
 1. Generate Clinic Monthly Template (5.3)
 2. Monthly Automated Scheduling (5.6)
 3. Monthly Schedule Kill and TBS refile (5.7)
 - 5 Available Capacity Grid Display (5.8)
3. Appointment Notices & Medical Exam Protocols
 - 1 Create/Edit Appointment Notice Text (System Manager's Guide)
 - 2 Appointment Notices Print (System Manager's Guide)
 - 3 Reprint Appointment Notice (System Manager's Guide)
 - 4 Employee Medical Exam Protocol (5.8)
 - 5 Medical Exam Protocol for Program (5.8)
 - 6 Medical Exam List (5.8)
4. Record Attended Appointments (6.5)
5. Exam Results Entry/Edit (6.6)

TABLE 3-1
MEDICAL EXAM SCHEDULING MENU OPTIONS
(Continued)

- 6. Cancel Medical Appointments
 - 1 Cancel Individual Medical Appointments (6.2)
 - 2 Block Cancellation of Medical Appointments. (6.3)
- 7. Missed Appointments (6.4)
- 8. Remove Employees from Medical Programs (4.3)
- 9. Medical Tables & Program/Tests Linkages
 - 1 Setup Medical Tables
 - 1. Clinic Table Entry/Edit (System Manager's Guide)
 - 2. Pre-exam Instructions Table Entry (System Manager's Guide)
 - 3. Medical Program Table Entry/Edit (System Manager's Guide)
 - 4. Medical Test Table Entry/Edit (System Manager's Guide)
 - 2 Setup/Display Medical Program Linkages
 - 1. Occupation/Medical Program Linkage (System Manager's Guide)
 - 2. Occupation/Medical Program Display (4.4)
 - 3. Location/Medical Program Linkage (System Manager's Guide)
 - 4. Location/Medical Program Display (4.4)
 - 5. Operation/Medical Program Linkage (System Manager's Guide)
 - 6. Operation/Medical Program Display (4.4)
 - 7. Scressor/Medical Program Linkage (System Manager's Guide)
 - 8. Scressor/Medical Program Display (4.4)

TABLE 3-1
MEDICAL EXAM SCHEDULING MENU OPTIONS
(Concluded)

10. Print Current Appointment Schedule

- 1 Appointment List by Clinic (5.8)
- 2 Appointment List by Shop (5.8)

11. Medical Exam Reports

- 1 Qualification Status Report (6.7)
- 2 Appointment History Details (6.7)
- 3 Appointment History Summary (6.7)
- 4 Performance Summary (6.7)
- 5 Missed Appointments Report (6.7)
- 6 Cancellation Report (6.7)
- 7 Removal Report (4.4)
- 8 Cost Accounting Report (6.7)
- 9 Program List per Operation by Shop (4.4)
- 10 Program History (4.4)
- 11 Report of Date Next/Birth Month
Discrepancies (4.4)
- 12 Full Qualification Status Report (6.7)

12. Medical Audit Functions

1. Discrepancy Audit of Personnel File
(System Manager's Guide)
2. Qualification Audit (System Manager's
Guide)
3. Schedule Audit (System Manager's Guide)
4. Discrepancy Audit for Prgm/Occ Changes
(System Manager's Guide)

4.0 MAINTAIN ENROLLMENT STATUS PROCESS

4.1 Introduction

The options listed in this section are used to identify an employee's one-time and periodic medical surveillance program enrollment, determine what it should be, and enter, modify, or correct enrollments either as deemed appropriate by an industrial hygienist or clinic physician or as requested by an employee's supervisor.

In addition to the reports listed in this section, you also may need to refer to the following reports to support the maintenance of employee enrollment statuses:

- o The Over MSAL Report, generated under the Exposure Module, provides information needed to determine what action, if any, was taken by the system as a result of an exposure.
- o The Program/Occupation Changes Discrepancy Audit lists any enrollments, modifications, or removals made by the system in response to changes in the surveillance requirements for an occupation. (See the System Manager's Guide).
- o The Discrepancy Audit of Personnel File describes minor modifications made by the system and reports discrepancies between an employee's enrollment and the surveillance program requirements for the employee's occupation. (See the System Manager's Guide).
- o The Report of Date Next/Birth Month Discrepancy lists any enrollments for which the projected date of the next examination is not in phase with the employee's birthdate and reexamination frequency.

The above reports and the Removal Report and Program History Report provide information on an employee's enrollment and on changes made to the enrollment. You can list the appropriate enrollment for an employee working in a location, occupation, operation, or with a scressor, by using the corresponding Program Linkage Display options. In addition, the Program List per Operation by Shop provides supervisors with data on enrollment needed for operations.

After a determination has been made to change an employee's enrollment, use the enrollment and removal options to enter, modify, or correct data for an employee's program enrollment.

4.2 Enrollment into Medical Programs Option

This option allows you to enroll an employee in a program for the first time, reenroll an employee who has been removed, modify an existing enrollment, or delete and replace an existing enrollment. You will want to "delete and replace" an existing enrollment if something was wrong with the enrollment as entered, e.g., the Reexamination Frequency, Reason for Enrollment, or Enrollment Type was in error. You would "modify" an existing enrollment if the original enrollment is correct but an enrollment field needs to be changed because of new circumstances, e.g., the Reexamination Frequency should be increased or the enrollment is no longer "required" but the enrollment is to be kept with Enrollment Type "personal" or "job related". A change in the Date Next Exam or Next Exam Type can always be created as a modification, since they are not kept historically. Figure 4-1 contains details on the enrollment entry sequence. In this example, we are reenrolling Janet Jackson in the lead program and then modifying the enrollment.

The circled numbers in the Figures in Sections 4 through 6 correspond to the numbered notes in the same figures. Messages and prompts displayed by the module are shown without underline, whereas keyed responses are underlined.

4.3 Remove Employees from Medical Programs Option

This option allows you to remove an employee from a program or modify an existing removal. When removing an employee from a program, you will be able to specify whether the employee should be given a removal examination. If you specify that no removal exam is to be done, and there is a To Be Scheduled file entry, you will be asked if you want it deleted. Figure 4-2 outlines the removal entry sequence. In this example, we are removing Janet Jackson from the Hydrocarbon program and setting up a removal exam.

4.4 Maintain Enrollment Status Output Options

Table 4-1 describes the selection and sort criteria you will encounter when using the options that produce reports pertinent to maintenance of enrollment. You need to check the Primer, Section 7, for guidance on the lookups used in selecting an employee, location, scressor, or agency. Also, see the Primer, Section 9.3, for information on responding to sort field prompts.

EMPLOYEE: 1
 1 JACKSON, JANET JACKSON, JANET
 F 567891 551111113 SHOP: 106 (MINS)
 2 JONES, JUDY JONES, JUDY
 F 433434 556789099 SHOP: 923 (MINS)
 CHOOSE 1-2: 1 JACKSON, JANET
 JACKSON, JANET DOB: SEP 29, 1971 OCC: 850490 INDUSTRIAL HYGIENE SHIFT: B
 DEVICE: A RIGHT MARGIN: 132// 80

PROGRAM HISTORY
 NAME SSN BADGE OCT 7, 1986 11:20 PAGE 1
 OCCUP JOB TITLE SHIFT BIRTHDATE
 AGENCY SHOP

JACKSON, JANET 551111113 567891 DAY SEP 29, 1971
 850490 INDUSTRIAL HYGIENE
 MINS 106
 02 ASBESTOS
 ENROLL: ENROLLED DATE LAST: 29 AUG 86 DATE NEXT: 1 SEP 9L
 EXAM: PERIODIC STATUS: QUALIFIED LAST QUAL. DATE: 29 AUG 86
 DATE ENROLLED: 28 JUL 86 ENROLL TYPE: REQUIRED
 REASON ENROLLED: CHANGE IN MS REQUIREMENTS
 DATE REMOVED: REEXAM: 60
 REASON REMOVED:
 08 CHROMIUM
 ENROLL: ENROLLED DATE LAST: DATE NEXT: 29 SEP 86
 EXAM: BASELINE STATUS: LAST QUAL. DATE:
 DATE ENROLLED: 30 JUL 86 ENROLL TYPE: PERSONAL
 REASON ENROLLED: OCCUPATIONAL EXPOSURE
 DATE REMOVED: REEXAM: 0
 REASON REMOVED: SET UP FOR SCHEDULING
 09 HEARING
 ENROLL: ENROLLED DATE LAST: DATE NEXT: 28 JUL 86
 EXAM: BASELINE STATUS: NOT QUALIFIED LAST QUAL. DATE: 31 JUL 86
 DATE ENROLLED: 28 JUL 86 ENROLL TYPE: REQUIRED
 REASON ENROLLED: CHANGE IN MS REQUIREMENTS
 DATE REMOVED: REEXAM: 12
 REASON REMOVED:
 10 HYDROCARBONS
 ENROLL: ENROLLED DATE LAST: DATE NEXT: 29 SEP 86
 EXAM: BASELINE STATUS: LAST QUAL. DATE:
 DATE ENROLLED: 30 JUL 86 ENROLL TYPE: PERSONAL
 REASON ENROLLED: OCCUPATIONAL EXPOSURE
 DATE REMOVED: REEXAM: 0
 REASON REMOVED:
 04 LEAD
 ENROLL: REMOVED DATE LAST: 29 AUG 86 DATE NEXT:
 EXAM: BASELINE STATUS: LAST QUAL. DATE: 29 AUG 86
 DATE ENROLLED: 31 JUL 86 ENROLL TYPE: PERSONAL
 REASON ENROLLED: OCCUPATIONAL EXPOSURE
 DATE REMOVED: 31 JUL 86 REEXAM: 0
 REASON REMOVED: SET UP FOR SCHEDULING
 40 RESPIRATORY PROTECTION
 ENROLL: ENROLLED DATE LAST: 29 AUG 86 DATE NEXT: 28 JUL 86
 EXAM: BASELINE STATUS: NOT QUALIFIED LAST QUAL. DATE: 2 SEP 86
 DATE ENROLLED: 28 JUL 86 ENROLL TYPE: REQUIRED
 REASON ENROLLED: CHANGE IN MS REQUIREMENTS
 DATE REMOVED: REEXAM: 12
 REASON REMOVED:
 16 SIGHT CONSERVATION
 ENROLL: ENROLLED DATE LAST: DATE NEXT: 28 JUL 86
 EXAM: BASELINE STATUS: NOT QUALIFIED LAST QUAL. DATE: 31 JUL 86
 DATE ENROLLED: 28 JUL 86 ENROLL TYPE: REQUIRED
 REASON ENROLLED: CHANGE IN MS REQUIREMENTS
 DATE REMOVED: REEXAM: 24
 REASON REMOVED:
 25 SOLVENTS
 ENROLL: ENROLLED DATE LAST: DATE NEXT: 30 JUL 86
 EXAM: BASELINE STATUS: NOT QUALIFIED LAST QUAL. DATE: 2 SEP 86
 DATE ENROLLED: 30 JUL 86 ENROLL TYPE: REQUIRED
 REASON ENROLLED: CHANGE IN MS REQUIREMENTS
 DATE REMOVED: REEXAM: 12
 REASON REMOVED:

FIGURE 4-1

ENROLLMENT INTO MEDICAL PROGRAMS

PROGRAM HISTORY
 NAME OCCUP JOB TITLE SHOP
 AGENCY

OCT 7, 1986 11:20 PAGE 2
 BSM BADGE SHIFT BIRTHDATE

Select MEDICAL PROGRAM NAME: LEAD 4 04
 ...OK? YES// (YES)
 MEDICAL PROGRAM: LEAD DATE LAST EXAM: AUG 29, 1986
 NEXT EXAM TYPE: BASELINE DATE ENROLLED: JUL 31, 1986 5
 ENROLLMENT STATUS: REMOVED ENROLLMENT TYPE: PERSONAL
 REEXAM FREQUENCY: 0 REASON ENROLLED: OCCUPATIONAL EXPOSURE
 DATE REMOVED: JUL 31, 1986 REASON REMOVED: SET UP FOR SCHEDULING
 DATE EXPOSURE REPORTED: JUL 31, 1986 OLD DATE NEXT: JUL 31, 1986
 DATE LAST PERIODIC EXAM: AUG 29, 1986

Do you want to ENROLL this Employee in this Program? Y 6
 REASON ENROLLED: OCCUPATIONAL EXPOSURE//
 ENROLLMENT TYPE: PERSONAL//
 REEXAM FREQUENCY: 0// 2
 THIS IS THE NUMBER OF MONTHS BETWEEN MEDICAL EXAMS.

Acceptable entries for this program are: 0 4
 REEXAM FREQUENCY: 0// 4
 DATE NEXT EXAM: SEP 29, 1987// (SEP 29, 1987) 7
 DATE EXPOSURE REPORTED: JUL 31, 1986// 8
 NEXT EXAM TYPE: BASELINE// 9
 Select MEDICAL PROGRAM NAME: LEAD 04
 ...OK? YES// (YES)

MEDICAL PROGRAM: LEAD DATE NEXT EXAM: SEP 29, 1987
 DATE LAST EXAM: AUG 29, 1986 NEXT EXAM TYPE: BASELINE
 DATE ENROLLED: OCT 7, 1986 ENROLLMENT STATUS: ENROLLED
 ENROLLMENT TYPE: PERSONAL REEXAM FREQUENCY: 4
 REASON ENROLLED: OCCUPATIONAL EXPOSURE DATE REMOVED: JUL 31, 1986
 REASON REMOVED: SET UP FOR SCHEDULING
 DATE EXPOSURE REPORTED: JUL 31, 1986 OLD DATE NEXT: JUL 31, 1986
 DATE LAST PERIODIC EXAM: AUG 29, 1986
 EXPIRATION DATE BASIS: SEP 29, 1987

Enter 'M' to Modify the ENROLLMENT or 'D' to Delete and replace the ENROLLMENT: M 10
 REASON ENROLLED: OCCUPATIONAL EXPOSURE//
 ENROLLMENT TYPE: PERSONAL//
 REEXAM FREQUENCY: 4//
 DATE NEXT EXAM: SEP 29, 1987// I (OCT 7, 1986) 11
 DATE EXPOSURE REPORTED: JUL 31, 1986//
 NEXT EXAM TYPE: BASELINE//

Filing in To Be Scheduled file 11 04
 Select MEDICAL PROGRAM NAME: LEAD
 ...OK? YES// (YES)
 MEDICAL PROGRAM: LEAD DATE NEXT EXAM: OCT 7, 1986
 DATE LAST EXAM: AUG 29, 1986 NEXT EXAM TYPE: BASELINE
 DATE ENROLLED: OCT 7, 1986 ENROLLMENT STATUS: ENROLLED
 ENROLLMENT TYPE: PERSONAL REEXAM FREQUENCY: 4
 REASON ENROLLED: OCCUPATIONAL EXPOSURE DATE REMOVED: JUL 31, 1986
 REASON REMOVED: SET UP FOR SCHEDULING
 DATE EXPOSURE REPORTED: JUL 31, 1986 OLD DATE NEXT: SEP 29, 1987
 DATE LAST PERIODIC EXAM: AUG 29, 1986
 EXPIRATION DATE BASIS: OCT 7, 1986

Enter 'M' to Modify the ENROLLMENT or 'D' to Delete and replace the ENROLLMENT: M
 REASON ENROLLED: OCCUPATIONAL EXPOSURE// DA
 1 DATE EXPOSURE REPORTED
 2 DATE NEXT EXAM
 CHOOSE 1-2: 2
 DATE NEXT EXAM: OCT 7, 1986// 9/1/87 (SEP 1, 1987)
 DATE EXPOSURE REPORTED: JUL 31, 1986//
 NEXT EXAM TYPE: BASELINE//
 The following is the current to BE SCHEDULED entry:
 PROGRAM TO BE SCHEDULED: LEAD ENROLLMENT TYPE: PERSONAL
 REEXAM FREQUENCY: 4 REASON FOR EXAM: OCCUPATIONAL EXPOSURE
 EXAM TYPE: BASELINE EXAM FOLLOWUP FLAG: INITIAL
 DATE EXPOSURE REPORTED: JUL 31, 1986 DATE FILED: OCT 7, 1986

WARNING: This Employee needs an exposure related exam for this Program 12

Do you want to DELETE this entry? N// Y 12
 Select MEDICAL PROGRAM NAME: -

EMPLOYEE: -

FIGURE 4-1

ENROLLMENT INTO MEDICAL PROGRAMS (Concluded)

NOTES ON ENROLLMENT INTO MEDICAL PROGRAMS OPTION

1. We are doing an employee lookup (Primer, Section 7.3).
2. We are specifying the device and modifying the margin width (Primer, Section 9.2).
3. This is the Program History Report for the selected employee. It includes the most recent enrollment and removal data for each program in which the employee has been enrolled. The Date Enrolled is the date on which the enrollment was entered. This date will change if a modification is filed. A Program History report only shows a Date Next Exam for a removed program if there is to be a removal exam in a future month.
4. Programs can be selected by Name or Code (Primer, Section 6).
5. This is a complete list of data fields associated with this program for the selected employee.
6. We are asked this because the employee is not currently enrolled. Once you indicate that you want to do an enrollment, you will have to complete it. If it is an error, you will have to do a removal to indicate the error.
7. The default for a new enrollment is the employee's next birthday.
8. This date is used to warn the system and the user of the need for an exposure related exam. It can be deleted if no such exam is necessary or if such an exam has already been given.
9. This field is prompted separately from the earlier fields, so you will not be able to " " back to earlier fields. A simple " " on an earlier field will bring you to this prompt.
10. Since we have selected an existing enrollment, the system is asking if we wish to change it.
11. Since we entered a Date Next Exam that is in the current month, the system files an entry into the To Be Scheduled file.

NOTES ON ENROLLMENT INTO MEDICAL PROGRAMS OPTION
(Concluded)

12. After we changed the Date Next Exam from a date in the current month to a future date, the system noticed that an entry was in the To Be Scheduled file. Since it may not be the same entry as the one we filed earlier--e.g., it might be the result of an exposure or a follow-up to an incomplete exam--we are asked if we want to delete it. Similarly, if we were filing into the To Be Scheduled file and there had already been a To Be Scheduled entry for the program, we would have been asked if we wanted to replace it. The WARNING message reminds us about the need for an exposure-related exam in case that would affect the decision on whether or not to delete the To Be Scheduled entry.

EMPLOYEE: J.J
 1 JACKSON, JANET JACKSON, JANET
 F 347893 551111113 SHOP: 106 (MINS)
 2 JONES, JUDY JONES, JUDY
 F 433434 556789099 SHOP: 923 (MINS)
 CHOOSE 1-2: 1 JACKSON, JANET
 JACKSON, JANET DOB: SEP 29, 1971 OCC: 650690 INDUSTRIAL HYGIENE SHIFT: D
 DEVICE:
 TRY LATER
 Select MEDICAL PROGRAM: 10 HYDROCARBONS 10
 ...OK? YES// (YES) ENROLLED
 MEDICAL PROGRAM: HYDROCARBONS
 DATE NEXT EXAM: SEP 29, 1986
 NEXT EXAM TYPE: BASELINE
 DATE ENROLLED: JUL 30, 1986
 ENROLLMENT STATUS: ENROLLED
 ENROLLMENT TYPE: PERSONAL
 REEXAM FREQUENCY: 0
 REASON ENROLLED: OCCUPATIONAL EXPOSURE
 DATE EXPOSURE REPORTED: JUL 31, 1986
 EXPIRATION DATE BASIS: SEP 29, 1986

WARNING: This Employee needs an exposure related exam for this Program

Do you want to REMOVE this Employee from this Program? Y (1)
 REASON REMOVED: NOT NEEDED
 DATE EXPOSURE REPORTED: JUL 31, 1986//
 Select MEDICAL PROGRAM: LEAD 04
 ...OK? YES// (YES) ENROLLED
 MEDICAL PROGRAM: LEAD
 DATE NEXT EXAM: SEP 1, 1987
 DATE LAST EXAM: AUG 29, 1986
 NEXT EXAM TYPE: BASELINE
 DATE ENROLLED: OCT 7, 1986
 ENROLLMENT STATUS: ENROLLED
 ENROLLMENT TYPE: PERSONAL
 REEXAM FREQUENCY: 6
 REASON ENROLLED: OCCUPATIONAL EXPOSURE
 DATE REMOVED: JUL 31, 1986
 REASON REMOVED: SET UP FOR SCHEDULING
 DATE EXPOSURE REPORTED: JUL 31, 1986
 OLD DATE NEXT: OCT 7, 1986
 DATE LAST PERIODIC EXAM: AUG 29, 1986
 EXPIRATION DATE BASIS: SEP 1, 1987

WARNING: This Employee needs an exposure related exam for this Program

Do you want to REMOVE this Employee from this Program? Y (1)
 Do you want to set up a removal exam? N// Y (2)
 DATE NEXT EXAM: SEP 1, 1987// (3)
 REASON REMOVED: SET UP FOR SCHEDULING Replace With NOT NEEDED ANYMORE
 Replace
 NOT NEEDED ANYMORE
 DATE EXPOSURE REPORTED: JUL 31, 1986//
 Select MEDICAL PROGRAM:

EMPLOYEE:

FIGURE 4-2

REMOVE EMPLOYEES FROM MEDICAL PROGRAMS

NOTES ON REMOVE EMPLOYEES FROM MEDICAL PROGRAMS OPTION

1. We are asked this since the employee is currently enrolled. If the employee had already been removed, we would have been asked if we wanted to correct the removal. For an employee who has an exam scheduled for the elected Program, the system will display a warning message at this point. Once you indicate that you want to remove a one-time enrollment, you will have to complete it. For a periodic enrollment, you can still change your mind at the prompt under Note 2. You will be warned if the employee has appointments scheduled that include this program.
2. We were asked this question because this is a periodic enrollment. Unless you enter an " " or " Q" you will have to complete the removal.
3. This date indicates the month and year in which the removal exam should be given. You will only be asked for this date if a removal exam is to be done. If you enter a date in the current month, the entry will be filed in the To Be Scheduled file.

TABLE 4-1
MAINTAIN ENROLLMENT STATUS OUTPUT OPTIONS

OPTION	SELECT FIELDS	SORT FIELDS
Program History	Employee	Agency
Removal Report	Date Removed Range	Agency Agency Unit Name
Report of Date Next/ Birth Month Discrepancies	Agency	
Occupation/Medical Program Display	One or all Occupations or one or all Programs	
Location/Medical Program Display	One or all Locations or one or all Programs	
Operation/Medical Program Display	One or all Operations or one or all Programs	
Stressor/Medical Program Display	One or all Programs or one Stressor, a class of Stressors or all Stressors	
Program List Per Operations by Shop	Agency	

5.0 SCHEDULING PROCESS

5.1 Introduction

The scheduling process allows you to track, schedule, and notify employees who need to have medical examinations. You can review the To Be Scheduled file entries as needed using the Display/Print Personnel Requiring Exams option. You can add to, modify, or delete these entries using the Enter/Edit Employees To Be Scheduled option.

Each clinic will choose to operate either a manual scheduling system or automated scheduling system. The System Manager's Guide describes the entry sequence for establishing a clinic scheduling system. If the clinic is using an automated scheduling system, you will have to use the Generate Clinic Monthly Template option to create an entry schedule before you will be able to schedule any appointments for the clinic in that month. At the same time, you can specify days or time slots that are unavailable because they are holidays or administrative time.

You can directly schedule or add to existing appointments by using the Schedule Appointments from To Be Scheduled option and the Direct Appointment Scheduling/Rescheduling option.

On a regular monthly basis, use the Monthly Automated Scheduling option to identify employee programs that have a Date Next Exam in the month you specify for selection. The identified programs will be filed in the To Be Scheduled file. The selection part of this option can only be run once for a selected month.

For a clinic using a manual scheduling system, you will probably want to review the To Be Scheduled file, or have it reviewed by the shops, before you schedule appointments. Once appointments are scheduled for a month, you will most likely want to run the Appointment List by Shop option for distribution. This report will supplement the Appointment Notices which are sent by the system as discussed in the System Manager's Guide.

For a clinic using an automated scheduling system, the Clinic Assignment Flag will specify that the system will either schedule appointments or provide candidate appointments slots and the Personnel Requiring Exams list for use by the shops.

If the system is to do the scheduling, the Monthly Automated Scheduling option will schedule any programs that are in the To Be Scheduled file after it does the selection of programs with a Date Next Exam in the selection month. Once scheduling is completed, you should rerun a list of Personnel

Requiring Exams. Employee entries may still be in the To Be Scheduled file if the system could not schedule them for one of the following reasons:

- o The Employee had more than one existing appointment already.
- o The programs include a program preference and the Clinic Program Preference Flag indicates that preferred programs are to be scheduled manually, i.e., directly.
- o During the Month To Be Scheduled, there were not enough contiguous available time slots to accommodate the length of the exams.
- o Sufficient contiguous available time slots were found, but one of the time slots was assigned a shift that did not match the employee's shift.
- o The employee had a preferred program and the Program Preference Flag specified that the system is to do the scheduling, but the system could not find an available time slot that matched the employee's program preference with sufficient contiguous available time slots that matched the employee's shift.

In any of these instances, you can schedule the appointments directly. Or, for entries in the last three categories, you can use the Generate Clinic Monthly Template option to modify the parameters on the Month To Be Scheduled and then rerun the automated scheduling part of the Monthly Automated Scheduling option. You can repeat this process as many times as necessary. You can also rerun the Automated Monthly Scheduling option whenever the To Be Scheduled file has entries.

Whenever you wish, you can review the schedule using the Appointment List by Clinic option or review the available capacity using the overview produced by the Monthly Automated Scheduling option. If the review indicates there are major problems in the distribution of the appointments, you can use the Monthly Schedule Kill and TBS Refile option. You can then modify, or kill and rebuild, the month's blank schedule template using the Generate Clinic Monthly Template option and ultimately rerun the Monthly Automated Scheduling option.

For a Clinic with an automated scheduling system for which the Clinic Assignment Flag indicates that shops are to be given blank time slots, the procedure will be the same as if the system were doing the scheduling. However, once you have a satisfactory appointment schedule, run the Monthly Automated Scheduling option an additional time for the purpose of running the Blank Time Slots Report and resetting the schedule. In other words,

the system will actually do scheduling, but then it will print the "appointments" as blank time slots that are available to the shop for scheduling, move the "appointments" back to the To Be Scheduled file, and print the Personnel Requiring Exams report. The shops will review the two reports, assign employees to the blank time slots, and return the list to be scheduled using the Schedule Appointments from To Be Scheduled option.

You can generate the Appointment List by Shop and Appointment List by Clinic as desired using the corresponding options. You may want to produce a clinic list at the beginning of the day for use in identifying walk-ins, scheduled appointments, and missed appointments.

The Employee Medical Protocol option is used to generate a clinic day's detailed exam protocols or the protocol for a selected employee appointment. The primary purpose of the protocol report is to provide the physicians with background data and a list of the items to be covered in an employee's appointment. The protocol report will also be used to record time in, time out, and exam results. Physicians may also wish to review the Medical Exam Protocol for a selected Program or the overall Medical Exam List.

5.2 Enter/Edit Employees To Be Scheduled Option

This option allows you to add, modify, or delete an employee's program from the To Be Scheduled file. If you are adding a new entry, any default values are from existing enrollment data for that program and employee. Figure 5-1 contains details on the prompt sequence for this option. In this example, we are editing the lead program and adding the chromium program to the To Be Scheduled file for Janet Jackson.

5.3 Generate Clinic Monthly Template Option

For clinics with automated scheduling systems, this option builds the empty monthly schedule for the specified month. You must use this option to build a month before the month starts, e.g., you can't build or rebuild October 1986 after 11:59 p.m. on September 30, 1986. Figure 5-2 describes the prompt sequence for this option. In this example, we are building the November 1986 monthly schedule for Branch Clinic Mare Island and designating holidays and administrative days. We then edit the template and change the parameters for several time slots.

EMPLOYEE: J.J

1	JACKSON, JANET	JACKSON, JANET			
	F	567891	551111113	SHOP: 106	(MINS)
2	JONES, JUDY	JONES, JUDY			
	F	433434	556789099	SHOP: 923	(MINS)

CHOOSE 1-2: 1 JACKSON, JANET (1)
JACKSON, JANET DOB: SEP 29, 1971 OCC: GS0690 INDUSTRIAL HYGIENE SHIFT: D

Select PROGRAM TO BE SCHEDULED: ?

ANSWER WITH PROGRAM TO BE SCHEDULED

CHOOSE FROM:

LEAD

RESPIRATORY PROTECTION (2)

YOU MAY ENTER A NEW PROGRAM TO BE SCHEDULED, IF YOU WISH

ANSWER WITH MEDICAL PROGRAM NAME

DO YOU WANT THE ENTIRE 26-ENTRY MEDICAL PROGRAM LIST? _

Select PROGRAM TO BE SCHEDULED: LEAD

04

...OK? YES// _ (YES)

WARNING: This Employee needs an exposure related exam for this Program

PROGRAM TO BE SCHEDULED: LEAD// _

ENROLLMENT TYPE: PERSONAL// _

REEXAM FREQUENCY: 0// 6

REASON FOR EXAM: OCCUPATIONAL EXPOSURE// _

EXAM TYPE: BASELINE// _

Select PROGRAM TO BE SCHEDULED: CHROMIUM

08

...OK? YES// _ (YES)

PROGRAM TO BE SCHEDULED: CHROMIUM// _ (3)

ENROLLMENT TYPE: 3// _ PERSONAL (4)

REEXAM FREQUENCY: 0// _

REASON FOR EXAM: OCCUPATIONAL EXPOSURE// _

EXAM TYPE: B// _ BASELINE

Select PROGRAM TO BE SCHEDULED: _

EMPLOYEE: _

FIGURE 5-1

ENTER/EDIT EMPLOYEES TO BE SCHEDULED

NOTES ON ENTER/EDIT EMPLOYEES TO BE SCHEDULED OPTION

1. We are doing an employee lookup (Primer, Section 7.3).
2. These are the existing program entries for the employee (Primer, Section 8.3).
3. Notice that we were not asked if we wanted to add this new multiple entry. You can use this prompt to delete the entry if it is an error (Primer, Section 8.3.3).
4. The default is in the internal FileMan format. The system responded to our null entry with the translation value.

Select CLINIC: MARE BRANCH CLINIC MARE ISLAND
 Do you want to edit an existins template? Y//N ①
 NEXT MONTH TO BE SCHEDULED: NOV 1986// ②
 Do you want to kill and rebuild a template for the selected month? N//Y ③
 ...BUILDING MONDAY 11/03/1986
 ...BUILDING TUESDAY 11/04/1986
 ...BUILDING WEDNESDAY 11/05/1986
 ...BUILDING THURSDAY 11/06/1986
 ...BUILDING FRIDAY 11/07/1986
 ...BUILDING MONDAY 11/10/1986
 ...BUILDING TUESDAY 11/11/1986
 ...BUILDING WEDNESDAY 11/12/1986
 ...BUILDING THURSDAY 11/13/1986 ④
 ...BUILDING FRIDAY 11/14/1986
 ...BUILDING MONDAY 11/17/1986
 ...BUILDING TUESDAY 11/18/1986
 ...BUILDING WEDNESDAY 11/19/1986
 ...BUILDING THURSDAY 11/20/1986
 ...BUILDING FRIDAY 11/21/1986
 ...BUILDING MONDAY 11/24/1986
 ...BUILDING TUESDAY 11/25/1986
 ...BUILDING WEDNESDAY 11/26/1986
 ...BUILDING THURSDAY 11/27/1986
 ...BUILDING FRIDAY 11/28/1986
 To Display Appointment Grid Enter START DATE:
 Select DATE SCHEDULED: 11/10 NOV 10, 1986 ⑤
 CLINIC, HOLIDAY OR ADMIN DAY?: CLINIC IN SESSION
 // HOLIDAY
 To Display Appointment Grid Enter START DATE:_
 Select DATE SCHEDULED: 11/17 NOV 17, 1986
 CLINIC, HOLIDAY OR ADMIN DAY?: CLINIC IN SESSION ⑥
 // —
 Select TIME SLOT START TIME: — ⑥
 To Display Appointment Grid Enter START DATE:_
 Select DATE SCHEDULED: 11/2 NOV 2, 1986 ?? ⑦
 Select DATE SCHEDULED: 11/27 NOV 27, 1986
 CLINIC, HOLIDAY OR ADMIN DAY?: CLINIC IN SESSION
 // HOLIDAY
 To Display Appointment Grid Enter START DATE:_
 Select DATE SCHEDULED: 11/28 NOV 28, 1986
 CLINIC, HOLIDAY OR ADMIN DAY?: CLINIC IN SESSION
 // ADMINISTRATIVE DAY
 To Display Appointment Grid Enter START DATE:_
 Select DATE SCHEDULED: —

FIGURE 5-2

GENERATE CLINIC MONTHLY TEMPLATE

Select CLINIC: MARE BRANCH CLINIC MARE ISLAND
 Do you want to edit an existing template? Y//
 To Display Appointment Grid Enter START DATE:
 Select DATE SCHEDULED: 11/17 NOV 17, 1986
 CLINIC, HOLIDAY OR ADMIN DAY?: CLINIC IN SESSION
 //
 Select TIME SLOT START TIME: 4 (8)
 Select TIME SLOT START TIME: 7
 Enter the time in one of the following formats:
 7 A, 7A, 7:15 A, 7:15A, 7 P, 7P, 7:15P, 7:15PM
 between 6 and 12 are assumed to be AM
 between 12:01 and 5:59 are assumed to be PM; if A or P is not entered
 ANSWER WITH TIME SLOT START TIME
 DO YOU WANT THE ENTIRE 36-ENTRY TIME SLOT START TIME LIST?
 Select TIME SLOT START TIME: 7
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 //
 CAPACITY: 2// 4
 PROGRAM PREFERENCE: LEAD//
 SHIFT: DAY// 2
 SURE YOU WANT TO DELETE? Y (YES)
 Select TIME SLOT START TIME: 7:15
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 //
 CAPACITY: 2// 4
 PROGRAM PREFERENCE: LEAD//
 SHIFT: DAY// 2
 SURE YOU WANT TO DELETE? Y (YES)
 Select TIME SLOT START TIME: 730
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 //
 CAPACITY: 2// 4
 PROGRAM PREFERENCE: LEAD//
 SHIFT: DAY// 2
 SURE YOU WANT TO DELETE? Y (YES)
 Select TIME SLOT START TIME: 745
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 //
 CAPACITY: 2// 4
 PROGRAM PREFERENCE: LEAD//
 SHIFT: DAY// 2
 SURE YOU WANT TO DELETE? Y (YES)
 Select TIME SLOT START TIME:
 To Display Appointment Grid Enter START DATE:
 Select DATE SCHEDULED: 11/4 NOV 4, 1986
 CLINIC, HOLIDAY OR ADMIN DAY?: CLINIC IN SESSION
 //
 Select TIME SLOT START TIME: 3P
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 // ADMINISTRATIVE TIME
 Select TIME SLOT START TIME: 1525
 Select TIME SLOT START TIME: 1515
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 // ADMINISTRATIVE TIME
 Select TIME SLOT START TIME: 3130
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 // ADMINISTRATIVE TIME
 Select TIME SLOT START TIME: 1545
 CLINIC, HOLIDAY OR ADMIN TIME?: CLINIC IN SESSION
 // ADMINISTRATIVE TIME
 Select TIME SLOT START TIME:
 To Display Appointment Grid Enter START DATE: 11/1 (NOV 1, 1986)
 ENTER STOP DATE: LAST//
 START TIME: FIRST//
 STOP TIME: LAST//
 DEVICE: A RIGHT MARGIN: 132//

FIGURE 5-2

GENERATE CLINIC MONTHLY TEMPLATE
 (Continued)

APPOINTMENT CAPACITY GRID									
DATE/TIME	700	800	900	1000	1100	1200	1300	1400	1500
11/03 M	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:15	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:30	2D04	2D	2D	2D	0	2D	2D	2D	4E
:45	2D04	2D	2D	2D	0	2D	2D	4E	4E
11/04 TU	2D	2D	2D	2D	0	2D	4D	4D	8AE
:15	2D	2D	2D	2D	0	2D	4D	4D	8AE
:30	2D	2D	2D	2D	0	2D	4D	4D	8AE
:45	2D	2D	2D	2D	0	2D	4D	4E	8AE
11/05 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/06 TH	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/07 F	2D04	2D04	2D04	2D	0	2D	4D	4D	4E
:15	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:30	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:45	2D04	2D04	2D	2D	0	2D	4D	4E	4E
11/10 M	*****HOLIDAY*****								
11/11 TU	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/12 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/13 TH	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/14 F	2D04	2D04	2D04	2D	0	2D	4D	4D	4E
:15	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:30	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:45	2D04	2D04	2D	2D	0	2D	4D	4E	4E
11/17 M	4 04	2D	2D	2D	0	2D	2D	2D	4E
:15	4 04	2D04	2D	2D	0	2D	2D	2D	4E
:30	4 04	2D	2D	2D	0	2D	2D	2D	4E
:45	4 04	2D	2D	2D	0	2D	2D	4E	4E
11/18 TU	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/19 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/20 TH	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/21 F	2D04	2D04	2D04	2D	0	2D	4D	4D	4E
:15	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:30	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:45	2D04	2D04	2D	2D	0	2D	4D	4E	4E
11/24 M	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:15	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:30	2D04	2D	2D	2D	0	2D	2D	2D	4E
:45	2D04	2D	2D	2D	0	2D	2D	4E	4E

APPOINTMENT CAPACITY GRID									
DATE/TIME	700	800	900	1000	1100	1200	1300	1400	1500
11/25 TU	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/26 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/27 TH	*****HOLIDAY*****								
11/28 F	*****ADMINISTRATIVE DAY*****								
Select DATE SCHEDULED: _____									

FIGURE 5-2

GENERATE CLINIC MONTHLY TEMPLATE
(Concluded)

NOTES ON GENERATE CLINIC MONTHLY TEMPLATE OPTION

1. Say "N" when you want to build a new monthly template or kill an old one and rebuild it.
2. This must be a future month.
3. If this month didn't already have a template, we would have been asked if we wanted to build a template. You cannot kill and rebuild a template that has appointments scheduled. On a kill, the system pauses for a long time while it kills the old information, so be patient.
4. The system automatically uses the generic weekly schedule from the clinic record and creates appropriate days and dates.
5. The system will pause briefly here to change the information for the day if it is made a holiday or administrative day.
6. We were asked for a time slot because the date has "clinic in session." Do not enter leading zeroes.
7. Only existing template dates are valid.
8. Only existing template time slot start times are valid.
9. The Appointment Grid allows you to review the Clinic Schedule as set up for a specified date and time span. Each time slot tells the capacity, shift, and program preference. In this example, at 7:00 on Monday, November 3, 1986, the Clinic can have two people in for examination. The people should work on the day shift. People with an exam due for the Lead program (code 04) will be given preference in this time slot. The next line down describes the 7:15 time slot. The next column over describes the 8:00 time slot. An "*A" indicates Administrative time; "*H" would be used for holiday time.

5.4 Direct Appointment Scheduling/Rescheduling Option

This option is used whenever you are scheduling an appointment without using the To Be Scheduled entries. You also use it to modify an appointment's date or time without cancelling the appointment, or to edit any other appointment data. For example, you can add, edit, or delete programs in an appointment. A change to the date, time, or programs included in an appointment will result in the system sending a new appointment notice. If you add a new program, the default values are from the existing enrollment data for that employee and program. Figure 5-3 outlines this option's prompt sequence. In this example, we are scheduling an appointment for Janet Jackson on October 9, 1986, despite there being no available capacity at the selected times.

5.5 Schedule Appointments from To Be Scheduled Option

This option allows you to schedule appointments or add to existing appointments using programs in the To Be Scheduled file. You can process To Be Scheduled entries in the order in which they occur in the file, or by selecting a specific employee. Figure 5-4 describes a typical prompt sequence for this option. In this example, we are adding To Be Scheduled programs onto an existing appointment for Janet Jackson.

5.6 Monthly Automated Scheduling Option

Use of this option varies depending on the clinic scheduling system. For a clinic using a manual scheduling system, use this option once each month to select the enrollment programs that have a Date Next Exam in the month being selected.

For a clinic using an automated scheduling system with the filled time slot option, use this option at least once a month to select enrollment programs and schedule any programs in the To Be Scheduled file. You can later rerun the option to do more scheduling.

For a clinic with an automated scheduling system and the blank time slot option, use this option to do the monthly selection, preliminary scheduling, and finally to generate the reports used by shops in scheduling and move the preliminary appointments back to the To Be Scheduled file.

Select CLINIC: MARE BRANCH CLINIC MARE ISLAND

EMPLOYEE: JA,J JACKSON, JANET

F 567891 551111113 SHOP: 106 (MINS)

...OK? YES//_ (YES)

JACKSON, JANET DOB: SEP 29, 1971 OCC: GS0690 INDUSTRIAL HYGIENE SHIFT: D

WARNING: This employee has exams in the TO BE SCHEDULED file

ARE YOU ADDING A NEW MEDICAL APPOINTMENT? Y (YES) ①

DATE SCHEDULED: I (OCT 9, 1986) ②

TIME SCHEDULED: 1100 ③

PRIMARY REASON FOR VISIT: OCCUPATIONAL EXPOSURE

VISIT FOLLOWUP FLAG: _

Select MEDICAL PROGRAM SCHEDULED: LEAD

04

...OK? YES//_ (YES)

MEDICAL PROGRAM SCHEDULED: LEAD//_

ENROLLMENT TYPE: 3//_ PERSONAL

REEXAM FREQUENCY: 0//_

REASON FOR EXAM: OCCUPATIONAL EXPOSURE//_

EXAM TYPE: B//_ BASELINE

EXAM FOLLOWUP FLAG: _

Select MEDICAL PROGRAM SCHEDULED: _

END OF APPOINTMENT: 1115//_ ④

APPOINTMENT AVAILABLE CAPACITY GRID ⑤

DATE/TIME 1100

10/09 TH 0

:15 0

:30 0

:45 0

Do you want to schedule for these time slots anyway? N//Y ⑤

...SORRY, JUST A MOMENT PLEASE...

EMPLOYEE: _

FIGURE 5-3

DIRECT APPOINTMENT SCHEDULE/RESCHEDULE

NOTES ON DIRECT APPOINTMENT SCHEDULE/RESCHEDULE OPTION

1. Since the employee does not already have appointments scheduled, we are being asked if we want to create an appointment. If there are appointments, you will be asked to select one. You will be asked if you want to add one only if you don't select an existing appointment. Once you add an appointment, you can only get rid of it by rescheduling it or cancelling it.
2. In an automated scheduling system, this date must be in the schedule template. Under any system, it must be a current or future date.
3. In an automated scheduling system, this time must be in the schedule template for the specified date.
4. The system calculates the estimated time the appointment will end, using the program exam lengths from the Medical Program file and presents the calculated time as the default. You can accept the default or change it as you wish. If the clinic uses an automated scheduling system, the end of appointment must be a valid time slot start time, or the end of the clinic day. The system calculated default may not meet these criteria, in which case you will have to change the default.
5. Under an automated scheduling system, if the time slots covered by the appointment do not have sufficient capacity left for another appointment or specify a shift that does not match the employee's shift, the system shows you the template for the time covered and asks if you want to book the appointment anyway. If you say "N" to the booking, the original date and times will be restored, but any other changes made, such as adding a program, will be kept. A warning message will appear if the appointment includes a time slot with a program preference which is not one of the appointment programs.

Select CLINIC: MARE BRANCH CLINIC MARE ISLAND
Do you wish to select records for a specific EMPLOYEE (E)
or process the next employee record (N)? N// E

EMPLOYEE: JA,J JACKSON, JANET
F 567891 551111113 SHOP: 106 (MINS)
...OK? YES//_ (YES)
JACKSON, JANET DOB: SEP 29, 1971 OCC: GS0690 INDUSTRIAL HYGIENE SHIFT: D
DEVICE:_ RIGHT MARGIN: 80//_

EMPLOYEES REQUIRING EXAMS
NAME SSN BADGE OCT 9, 1986 15:09 PAGE 1
OCCUP AGENCY JOB TITLE SHOP SHIFT BIRTHDATE

JACKSON, JANET 551111113 567891 DAY SEP 29, 1971
GS0690 INDUSTRIAL HYGIENE
MINS 106
08 CHROMIUM
DATE LAST: DATE NEXT: SEP 29, 1986 REEXAM: 0
ENROLL: PERSONAL LENGTH: 15 EXAM: BASELINE INIT/FOL:
REASON: OCCUPATIONAL EXPOSURE
04 LEAD
DATE LAST: AUG 29, 1986 DATE NEXT: REEXAM: 6
ENROLL: PERSONAL LENGTH: 15 EXAM: BASELINE INIT/FOL: INITIAL
REASON: OCCUPATIONAL EXPOSURE
40 RESPIRATORY PROTECTION
DATE LAST: AUG 29, 1986 DATE NEXT: JUL 28, 1986 REEXAM: 0
ENROLL: PERSONAL LENGTH: 15 EXAM: BASELINE INIT/FOL: INITIAL
REASON: OCCUPATIONAL EXPOSURE

Select from the following if you want to add these programs
to a current Appointment: 10-09-86 at 1100 OCCUPATIONAL EXPOSURE (1)

04 LEAD
...OK? YES//_ (YES)
END OF APPOINTMENT: 1145//_ (2)

APPOINTMENT AVAILABLE CAPACITY GRID

DATE/TIME 1100
10/09 TH -1
:15 0
:30 0
:45 0

Do you want to schedule for these time slots anyway? N//Y (3)

EMPLOYEE:_

FIGURE 5-4

SCHEDULE APPOINTMENTS FROM TO BE SCHEDULED

NOTES ON SCHEDULE APPOINTMENTS FROM TO BE SCHEDULED OPTION

1. Since there is one existing appointment, we are given the opportunity to add to it. You can set up a new appointment by not selecting an existing one and saying you want to add an appointment.
2. The system adjusts the end of the current appointment to accommodate the additional time needed for programs in the To Be Scheduled file that are not already in the current appointment.
3. The only difference between this and the prompting under the Direct Appointment Schedule/Reschedule Option is that the programs in the To Be Scheduled file will only be added to the appointment if no problem is found or if you tell the system to schedule the appointment anyway. If the existing appointment includes one of the programs that is in the To Be Scheduled file, the old appointment program entry will be replaced when the programs are moved to the appointment. The system will delete the To Be Scheduled entries if you schedule them in an appointment.

This option cannot be used while anyone is using the Employee, Clinic, or Medical Appointment files. Figure 5-5 describes typical prompt sequences for this option. In this example, we do selection for Branch Clinic Treasure Island which has a manual scheduling system. For Branch Clinic North Island, which has automated scheduling with the filled time slot option, we do selection and one scheduling run. For Branch Clinic Mare Island, which has automated scheduling with the blank time slot option, we have already done the selection and scheduling, so we run the reports and reset the schedule.

5.7 Monthly Schedule Kill and TBS Refile Option

For clinics using an automated scheduling system, you may occasionally need to use this option if the schedule for a month has problems that require major changes to the schedule template. The prompt sequence is similar to the Automated Monthly Scheduling option prompt sequence. The first device prompt pertains to the schedule grid for the clinic during the month in question. The latter device prompt is for the device on which the option will be run. See Figure 5-5, Notes 2 and 3, for additional information.

5.8 Scheduling Output Options

Table 5-1 lists all the options which produce reports under the Scheduling Process; the prompt sequences for these options are self-explanatory. See the Primer, Section 9.3, for information on responding to sort field prompts.

Select CLINIC: TIBC BRANCH CLINIC TREASURE ISLAND
NEXT MONTH TO BE SELECTED: 10/86 (OCT 1986)

CLINIC PARAMETERS

OCT 9, 1986 15:10 PAGE 1

CLINIC: BRANCH CLINIC TREASURE ISLAND (TIBC)

PROGRAM PREFERENCE:

SCHEDULING TYPE: MANUAL SCHEDULING

CLINIC ASSIGNMENT:

START: END:

LENGTH:

NEXT SELECTED: OCT 86 (1)

NEXT SCHEDULED: JAN 87

PROGRAM PREFERENCE:

Enter 'RETURN' to continue _

Are you sure these parameters are correct? N// Y (1)

DEVICE: A RIGHT MARGIN: 132//_ (2)

REQUESTED TIME TO PRINT: NOW//_ (3)

REQUEST QUEUED!

Select CLINIC: BCNI BRANCH CLINIC NORTH ISLAND

NEXT MONTH TO BE SELECTED: 11/86 (NOV 1986)

NEXT MONTH TO BE SCHEDULED: NOV 1986//_ (4)

CLINIC PARAMETERS

OCT 10, 1986 16:28 PAGE 1

CLINIC: BRANCH CLINIC NORTH ISLAND (BCNI) (5)

PROGRAM PREFERENCE: AUTOMATIC

SCHEDULING TYPE: AUTOMATED SCHEDULING

CLINIC ASSIGNMENT: FILLED TIME SLOTS (AUTOMATED)

START: 700 END: 1400

LENGTH: 30 MINUTES

NEXT SELECTED: NOV 86

NEXT SCHEDULED: NOV 86

PROGRAM PREFERENCE: 47 WELDERS EXAM

Enter 'RETURN' to continue _

DEVICE: A RIGHT MARGIN: 132//_ (6)

FIGURE 5-5

MONTHLY AUTOMATED SCHEDULING

		APPOINTMENT AVAILABLE CAPACITY GRID					
DATE/TIME	700	800	900	1000	1100	1200	1300
11/03	M	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/04	TU	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/05	W	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/06	TH	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/07	F	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/10	M	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/11	TU	#####HOLIDAYS#####					
11/12	W	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/13	TH	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/14	F	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/17	M	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/18	TU	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/19	W	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/20	TH	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/21	F	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/24	M	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/25	TU	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/26	W	2	2	2	2	2	2
:30		2	2	2	2	2	2
11/27	TH	#####HOLIDAYS#####					
11/28	F	2	2	2	2	2	2
:30		2	2	2	2	2	2

Are you sure these parameters are correct? N// Y
 DEVICE: A RIGHT MARGIN: 132//

REQUESTED TIME TO PRINT: NOW//
 REQUEST QUEUED!

Select CLINIC: BCNI BRANCH CLINIC NORTH ISLAND
 NEXT MONTH TO BE SELECTED: NOV 1986//
 Monthly selection for scheduling has been done for the selected month.
 Do you want to make a second automated scheduling run? N//

Select CLINIC: HARE BRANCH CLINIC HARE ISLAND
 NEXT MONTH TO BE SELECTED: DEC 1, 1986// 11/86 (NOV 1986)
 Monthly selection for scheduling has been done for the selected month.
 Do you want to make a second automated scheduling run? N// Y
 NEXT MONTH TO BE SCHEDULED: NOV 1986//

CLINIC PARAMETERS OCT 10, 1986 16:52 PAGE 1

CLINIC: BRANCH CLINIC HARE ISLAND (HARE)
 PROGRAM PREFERENCE: AUTOMATIC
 SCHEDULING TYPE: AUTOMATED SCHEDULING
 CLINIC ASSIGNMENT: BLANK TIME SLOTS (AUTOMATED)
 START: 700 END: 1600 LENGTH: 15 MINUTES
 NEXT SELECTED: NOV 86 NEXT SCHEDULED: NOV 86
 PROGRAM PREFERENCE: 04 LEAD
 Enter 'RETURN' to continue
 DEVICE: A RIGHT MARGIN: 132// 132

FIGURE 5-5

MONTHLY AUTOMATED SCHEDULING
 (Continued)

APPOINTMENT AVAILABLE CAPACITY GRID									
DATE/TIME	700	800	900	1000	1100	1200	1300	1400	1500
11/03 M	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:15	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:30	2D04	2D	2D	2D	0	2D	2D	2D	4E
:45	2D04	2D	2D	2D	0	2D	2D	4E	4E
11/04 TU	2D	2D	2D	2D	0	2D	4D	4D	8AE
:15	2D	2D	2D	2D	0	2D	4D	4D	8AE
:30	2D	2D	2D	2D	0	2D	4D	4D	8AE
:45	2D	2D	2D	2D	0	2D	4D	4E	8AE
11/05 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/06 TH	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/07 F	2D04	2D04	2D04	2D	0	2D	4D	4D	4E
:15	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:30	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:45	2D04	2D04	2D	2D	0	2D	4D	4E	4E
11/10 M	*****HOLIDAY*****								
11/11 TU	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/12 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/13 TH	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/14 F	2D04	2D04	2D04	2D	0	2D	4D	4D	4E
:15	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:30	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:45	2D04	2D04	2D	2D	0	2D	4D	4E	4E
11/17 M	4 04	2D04	2D	2D	0	2D	2D	2D	4E
:15	4 04	2D04	2D	2D	0	2D	2D	2D	4E
:30	4 04	2D	2D	2D	0	2D	2D	2D	4E
:45	4 04	2D	2D	2D	0	2D	2D	4E	4E
11/18 TU	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/19 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/20 TH	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/21 F	2D04	2D04	2D04	2D	0	2D	4D	4D	4E
:15	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:30	2D04	2D04	2D	2D	0	2D	4D	4D	4E
:45	2D04	2D04	2D	2D	0	2D	4D	4E	4E
11/24 M	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:15	2D04	2D04	2D	2D	0	2D	2D	2D	4E
:30	2D04	2D	2D	2D	0	2D	2D	2D	4E
:45	2D04	2D	2D	2D	0	2D	2D	4E	4E

APPOINTMENT AVAILABLE CAPACITY GRID									
DATE/TIME	700	800	900	1000	1100	1200	1300	1400	1500
11/25 TU	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E
11/26 W	2D	2D	2D	2D	0	2D	4D	4D	4E
:15	2D	2D	2D	2D	0	2D	4D	4D	4E
:30	2D	2D	2D	2D	0	2D	4D	4D	4E
:45	2D	2D	2D	2D	0	2D	4D	4E	4E

11/27 TH *****HOLIDAY*****
 11/28 F *****ADMINISTRATIVE DAY*****
 Are you sure these parameters are correct? N// I
 DEVICE: A RIGHT MARGIN: 132//

REQUESTED TIME TO PRINT: NOW//
 REQUEST QUEUED!

FIGURE 5-5

MONTHLY AUTOMATED SCHEDULING
 (Continued)

Select CLINIC: BRANCH CLINIC MARE ISLAND
NEXT MONTH TO BE SELECTED: DEC 1, 1986// 11/86 (NOV 1986)
Monthly selection for scheduling has been done for the selected month.
Do you want to make a second automated scheduling run? N// (11)
Do you want to run the Blank Slot reports and reset the schedule? N// Y (11)
NEXT MONTH TO BE SCHEDULED: NOV 1986// (11)

CLINIC PARAMETERS

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CLINIC: BRANCH CLINIC MARE ISLAND (MARE)
PROGRAM PREFERENCE: AUTOMATIC
SCHEDULING TYPE: AUTOMATED SCHEDULING
CLINIC ASSIGNMENT: BLANK TIME SLOTS (AUTOMATED)
START: 700 END: 1600 LENGTH: 15 MINUTES
NEXT SELECTED: NOV 86 NEXT SCHEDULED: NOV 86
PROGRAM PREFERENCE: 04 LEAD
Enter 'RETURN' to continue
DEVICE: A RIGHT MARGIN: 132//

FIGURE 5-5

MONTHLY AUTOMATED SCHEDULING
(Continued)

APPOINTMENT AVAILABLE CAPACITY GRID									
DATE/TIME	700	800	900	1000	1100	1200	1300	1400	1500
11/03 M	2004	2004	20	20	0	20	20	20	4E
:15	2004	2004	20	20	0	20	20	20	4E
:30	2004	20	20	20	0	20	20	20	4E
:45	2004	20	20	20	0	20	20	4E	4E
11/04 TU	20	20	20	20	0	20	40	40	8AE
:15	20	20	20	20	0	20	40	40	8AE
:30	20	20	20	20	0	20	40	40	8AE
:45	20	20	20	20	0	20	40	4E	8AE
11/05 W	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/06 TH	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/07 F	2004	2004	2004	20	0	20	40	40	4E
:15	2004	2004	20	20	0	20	40	40	4E
:30	2004	2004	20	20	0	20	40	40	4E
:45	2004	2004	20	20	0	20	40	4E	4E
11/10 M	*****HOLIDAY*****								
11/11 TU	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/12 W	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/13 TH	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/14 F	2004	2004	2004	20	0	20	40	40	4E
:15	2004	2004	20	20	0	20	40	40	4E
:30	2004	2004	20	20	0	20	40	40	4E
:45	2004	2004	20	20	0	20	40	4E	4E
11/17 M	0 04	2004	20	20	0	20	20	20	4E
:15	0 04	2004	20	20	0	20	20	20	4E
:30	0 04	20	20	20	0	20	20	20	4E
:45	2 04	20	20	20	0	20	20	4E	4E
11/18 TU	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/19 W	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/20 TH	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/21 F	2004	2004	2004	20	0	20	40	40	4E
:15	2004	2004	20	20	0	20	40	40	4E
:30	2004	2004	20	20	0	20	40	40	4E
:45	2004	2004	20	20	0	20	40	4E	4E
11/24 M	2004	2004	20	20	0	20	20	20	4E
:15	2004	2004	20	20	0	20	20	20	4E
:30	2004	20	20	20	0	20	20	20	4E
:45	2004	20	20	20	0	20	20	4E	4E

APPOINTMENT AVAILABLE CAPACITY GRID									
DATE/TIME	700	800	900	1000	1100	1200	1300	1400	1500
11/25 TU	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E
11/26 W	20	20	20	20	0	20	40	40	4E
:15	20	20	20	20	0	20	40	40	4E
:30	20	20	20	20	0	20	40	40	4E
:45	20	20	20	20	0	20	40	4E	4E

11/27 TH *****HOLIDAY*****
 11/28 F *****ADMINISTRATIVE DAY*****
 Are you sure these parameters are correct? N// Y
 DEVICE: A RIGHT MARGIN: 132//

REQUESTED TIME TO PRINT: NOW//
 REQUEST QUEUED:

FIGURE 5-5

MONTHLY AUTOMATED SCHEDULING
 (Concluded)

NOTES ON MONTHLY AUTOMATED SCHEDULING OPTION

1. Since this is a manual scheduling system, the only parameter you have to verify is the Next Month to be Selected.
2. This is the device on which the selection step will be run. Processing will take place when the device you specify is available to the system. Therefore, if you select the device you are on, you will have to log off before the processing will actually happen.
3. The system will run the job at the date and time you specify, or as soon thereafter as possible. If the job does not run as scheduled, contact your supervisor or System Manager.
4. Since this clinic uses an automated scheduling system, we are asked for the month in which to schedule the appointments.
5. You should check all parameters for an automated scheduling system.
6. This is the device prompt for the display of the available capacity grid (Primer, Section 9.2).
7. Since the parameters are correct, we have answered "Y". If they are not correct, you can use the Generate Monthly Template option to modify the schedule capacity, or call your supervisor or System Manager to change the clinic parameters.
8. This is the device on which the selection and scheduling steps will be run. (Notes 2 and 3, above)
9. If you wish to have the system schedule the entries in the To Be Scheduled file, answer "Y". The prompt sequence would then continue by asking for the Next Month to be Scheduled, displaying the clinic parameters, asking if the parameters are correct, and prompting for the device.
10. In this case, the clinic uses an automated scheduling system with the blank time slot option. We have already done the selection and scheduling steps and are now rerunning the scheduling step, presumably after making some adjustments to the schedule capacity parameters.

NOTES ON MONTHLY AUTOMATED SCHEDULING OPTION (Concluded)

11. We have indicated that we don't want to do the scheduling step again, since a manual review of the schedule indicated that it is adequate. Because this is an automated scheduling system with the blank time slot option, we are then asked if we want to produce the necessary reports and have the "appointments" for the month specified refiled in the To Be Scheduled file.
12. This is the device on which the reports will be printed. (Notes 2 and 3, above)

TABLE 5-1
SCHEDULING OUTPUT OPTIONS

OPTION	SELECT FIELDS	SORT FIELDS
Display/Print Personnel Requiring Exams	Clinic	Agency Employee Name
Available Capacity Grid Display		Date Time Slot
Employee Medical Exam Protocol	Appointment or Clinic and Date	
Medical Exam Protocol for Program	Program	
Medical Exam List (no sort or selection)		
Appointment List by Clinic	Clinic	Date Time Slot
Appointment List by Shop	Clinic Date Range Time Slot Range	Agency Agency Unit

6.0 UPDATE APPOINTMENT HISTORY PROCESS

6.1 Introduction

Options under this process are used to record and retrieve data on missed, cancelled, and attended appointments and related employee qualification data.

The cancellation options can be used to cancel an individual or group of future appointments. If an appointment is scheduled in error, you should cancel it to delete it from the schedule; otherwise, once the appointment's scheduled date is past, the system may automatically treat it as a missed appointment.

Attended appointments include both scheduled appointments and unscheduled walk-ins. In either case, start with the Record Attended Appointments option when the employee enters the clinic. Recording a scheduled appointment should be a straightforward matter.

In recording an unscheduled walk-in, you will sometimes be faced with an individual who is a new hire or prehire and is not in the Employee file or is in the file as "terminated". In such cases, someone authorized to use the Enter/Edit Employee option in the Administration Module will have to enter the appropriate employee data. Entry of employee data may generate To Be Scheduled file entries based on programs linked to the employee's occupation.

For any walk-in, even one on the Employee file, you should check the To Be Scheduled file using the Display/Print Personnel Requiring Exams option. If there are entries for the employee, you should use the Schedule Appointments from To Be Scheduled option to create an appointment for today, and then use the Record Attended Appointments option to create the Appointment History record. You should then change the Scheduled or Unscheduled field entry to "unscheduled". While this course of action may seem lengthy, it will save data entry time, ensure program data integrity, and avoid the need to delete the To Be Scheduled entries, which may otherwise get scheduled a second time.

After the employee has been seen, you will use the Exam Results Entry/Edit option to enter the employee's Clinic Time Out and individual exam results as recorded on the first part of the Employee Medical Exam Protocol. This option may also require you to enter or modify some employee enrollment data.

Once the clinic day is over, or at appropriate times during the day, use the Missed Appointments option to record unattended appointments and any justification offered. Eventually, the system will record as "missed" any past appointments that are not already recorded as "attended" or "missed". Check with your supervisor or System Manager to find out what the time limit is for your clinic.

The reports covered under this process are mostly summaries for use by management. The Cost Accounting Report is only available for agencies that are under a clinic which tracks cost accounting data. See the System Manager's Guide for further information on this report.

6.2 Cancel Individual Medical Appointments Option

You use this option to create and edit Individual Appointment History records for cancelled appointments and, if desired, to reschedule them or file them in the To Be Scheduled file. Figure 6-1 describes the prompt sequence for this option. In this example, for Branch Clinic Mare Island, we decide not to enter a record for Janet Jackson. We then enter and edit a cancellation for Judy Jones and reschedule the appointment.

6.3 Block Cancellation of Medical Appointments Option

This option allows you to cancel all appointments that start during the specified time period. You can have the system file the cancelled appointments in the To Be Scheduled file. In addition, you can tell the system to flag the time slots as unavailable administrative time. If there are still appointments on file that include the specified time period, you can use the Appointment List by Clinic option to identify them and decide whether to cancel them individually. Figure 6-2 provides details on this option's prompt sequence. In this example, for Branch Clinic Mare Island, we cancel all appointments on October 31, 1986, and file them in the To Be Scheduled file. We also have the system make the time unavailable.

6.4 Missed Appointments Option

You use this option to create or edit Appointment History records for missed appointments and, if desired, to reschedule them or file them in the To Be Scheduled file. This option closely resembles the Cancel Individual Medical Appointments option, so review Figure 6-1 for the prompt sequence. One difference is that the appointments from which you are allowed to select must be for today or before. The other difference is that you are prompted for an optional word processing field called Missed Appointments Justification, instead of being asked for a Cancellation Date and Reason for Cancellation. Leave this field blank unless an appropriate justification is provided by the shop or employee, since this will affect the statistics produced by reports.

Select CLINIC: MARE BRANCH CLINIC MARE ISLAND

EMPLOYEE WITH CANCELLED APPOINTMENT: J,J

1 JACKSON, JANET JACKSON, JANET

F 567891 55111113 SHOP: 106 (MINS)

2 JONES, JUDY JONES, JUDY

F 433434 556789099 SHOP: 923 (MINS)

CHOOSE 1-2: 1 JACKSON, JANET

JACKSON, JANET DOB: SEP 29, 1971 OCC: GS0690 INDUSTRIAL HYGIENE SHIFT: D

Select the Appointment to be cancelled from these Scheduled Appointments:

APPOINTMENT not found. (1)

If you want to enter/edit a cancelled APPOINTMENT record:

Select MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT: 2 (1)

EMPLOYEE WITH CANCELLED APPOINTMENT: JO, J JONES, JUDY

F 433434 556789099 SHOP: 923 (MINS)

...OK? YES// 2 (YES)

JONES, JUDY DOB: MAY 3, 1963 OCC: GS1311 PHYSICAL SCIENCE TECHNICIAN SHIFT: D

Select the Appointment to be cancelled from these Scheduled Appointments:

10-31-86 at 800 PERIODIC

40 RESPIRATORY PROTECTION

...OK? YES// 2 (YES)

ARE YOU ADDING A NEW MEDICAL APPOINTMENT HISTORY? Y (YES) (2)

CANCELLATION DATE: T// 2 (OCT 22, 1986)

REASON FOR CANCELLATION: 2

CHOOSE FROM:

S SHOP CANCELLED

C CLINIC CANCELLED

REASON FOR CANCELLATION: S SHOP CANCELLED

Enter 'Y' to reschedule this appointment for an unspecified Date/Time, (3)

'R' to reschedule for a known Date/Time,

'N' to not reschedule. Y// R

DATE SCHEDULED: OCT 31, 1986// 2 (4)

TIME SCHEDULED: 800// 2

Required field missing, multiple entry not fully processed, (4)
or field did not pass condition check.

DATE SCHEDULED: OCT 31, 1986// 11/5 (NOV 5, 1986) (5)

TIME SCHEDULED: 800// 2

END OF APPOINTMENT: 815// 2

...SORRY, JUST A MOMENT PLEASE...

FIGURE 6-1

CANCEL INDIVIDUAL MEDICAL APPOINTMENTS

EMPLOYEE WITH CANCELLED APPOINTMENT: JO, J JONES, JUDY

F. 433434

556789099

SHOP: 923

(MINS)

...OK? YES// (YES)

JONES, JUDY DOB: MAY 3, 1963 OCC: GS1311 PHYSICAL SCIENCE TECHNICIAN SHIFT: D

Select the Appointment to be cancelled from these Scheduled Appointments:

11-05-86 at 800 PERIODIC

40 RESPIRATORY PROTECTION

...OK? YES// N (NO)

APPOINTMENT not found.

If you want to enter/edit a cancelled APPOINTMENT record:

Select MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT: ? 6

ANSWER WITH MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT

DO YOU WANT THE ENTIRE MEDICAL APPOINTMENT HISTORY LIST? Y (YES)

CHOOSE FROM:

10-31-1986 CANCELLED at 800 PERIODIC

40 RESPIRATORY PROTECTION

YOU MAY ENTER A NEW MEDICAL APPOINTMENT HISTORY, IF YOU WISH

Select MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT: 10/31 6 OCT 31, 1986

40 RESPIRATORY PROTECTION

CANCELLED at 800 PERIODIC

...OK? YES// (YES)

REASON FOR VISIT: PERIODIC//

VISIT FOLLOWUP FLAG: INITIAL//

SCHEDULED OR UNSCHEDULED?: SCHEDULED//

CANCELLATION DATE: OCT 22, 1986//

REASON FOR CANCELLATION: SHOP CANCELLED//

Select PROGRAM: 2 7

ANSWER WITH PROGRAM:

RESPIRATORY PROTECTION

YOU MAY ENTER A NEW PROGRAM, IF YOU WISH

ONLY ONE ENTRY PER PROGRAM

ANSWER WITH MEDICAL PROGRAM NAME

DO YOU WANT THE ENTIRE 26-ENTRY MEDICAL PROGRAM LIST?

Select PROGRAM: ASBESTOS

02

...OK? YES// (YES) 8

PROGRAM: ASBESTOS// 9

ENROLLMENT TYPE: 1 REQUIRED

REEXAM FREQUENCY: 60

REASON FOR EXAM: OCCUPATIONAL EXPOSURE

EXAM TYPE: B BASELINE

EXAM FOLLOWUP FLAG:

Select PROGRAM: RESPIRATORY PROTECTION

40

...OK? YES// (YES) 10

PROGRAM: RESPIRATORY PROTECTION//

ENROLLMENT TYPE: PERSONAL//

REEXAM FREQUENCY: 0//

REASON FOR EXAM: OCCUPATIONAL EXPOSURE//

EXAM TYPE: BASELINE//

EXAM FOLLOWUP FLAG: INITIAL//

Select PROGRAM:

EMPLOYEE WITH CANCELLED APPOINTMENT:

FIGURE 6-1

CANCEL INDIVIDUAL MEDICAL APPOINTMENTS

(Concluded)

NOTES ON CANCEL INDIVIDUAL MEDICAL APPOINTMENTS OPTION

1. We are not given the option to select an existing appointment because there was nothing in the schedule for today or the future. We are still given the option of directly entering an Appointment History record. If you do not select an existing scheduled appointment, or there is none and you enter a record directly, you will be prompted for all pertinent fields.
2. We have selected an appointment and indicated that we want to create a new Appointment History record. All data from that appointment becomes part of the new record.
3. The reschedule option cannot be used to reschedule an appointment by adding it to an existing one. If you want to do that, specify "Y" and use the Schedule Appointments from To Be Scheduled option.
4. We got the error message because we did not change the date or time.
5. From here on, the prompt sequence will resemble that listed under Figure 5-3.
6. In this case, we are editing an existing record. You can enter a new date, in which case the prompt sequence will be the same.
7. Once you get to this prompt, you cannot skip back to earlier prompts. Also, if you enter an "-" at an earlier prompt, you will be at this prompt, which is for a multiple field within the record (NOHIMS Primer, Section 8).
8. Although we are adding a new program, we are not asked the "add" question. If you mistakenly add a program to an Appointment History record by selecting the program, you can delete it at the Program field prompt.
9. There are no defaults since there is no existing enrollment for this employee and program.
10. We have selected an existing appointment history program and could edit the fields shown.

Select CLINIC: MARE BRANCH CLINIC MARE ISLAND
ENTER DATE OF APPOINTMENTS TO BE CANCELLED: 10/31 (OCT 31, 1986)
START TIME TO BEGIN CANCELLING: FIRST//
STOP TIME TO END CANCELLING: LAST//
DEVICE: A RIGHT MARGIN: 132//

MEDICAL APPOINTMENT LIST DISPLAY

2

OCT 22, 1986 15:31 PAGE 1

31 OCT 86 700 MARKHAM, RICK 311111120 12354 DAY
DOB: FEB 28, 1946 OCCUP: WG6641 TITLE: ORDNANCE EQUIPMENT MECHANIC
VISIT REASON: PERIODIC INIT/FOLL: INITIAL
PROGRAM:
10 HYDROCARBONS
EXAM REASON: OCCUPATIONAL EXPOSURE
04 LEAD EXAM REASON: OCCUPATIONAL EXPOSURE
40 RESPIRATORY PROTECTION
EXAM REASON: OCCUPATIONAL EXPOSURE
33 BENZENE
EXAM REASON: OCCUPATIONAL EXPOSURE

31 OCT 86 700 BAEZ, JOAN 000000019 13405 DAY
DOB: JUN 6, 1946 OCCUP: GS1311 TITLE: PHYSICAL SCIENCE TECHNICIAN
VISIT REASON: PERIODIC INIT/FOLL: INITIAL
PROGRAM:
04 LEAD EXAM REASON: OCCUPATIONAL EXPOSURE
40 RESPIRATORY PROTECTION
EXAM REASON: OCCUPATIONAL EXPOSURE

31 OCT 86 730 HARRISON, BEN 732222222 4545455 DAY
DOB: DEC 12, 1933 OCCUP: GS0341 TITLE: ADMINISTRATIVE OFFICER
VISIT REASON: PERIODIC INIT/FOLL: INITIAL
PROGRAM:
04 LEAD EXAM REASON: OCCUPATIONAL EXPOSURE
40 RESPIRATORY PROTECTION
EXAM REASON: OCCUPATIONAL EXPOSURE

Do you want to proceed with cancelling appointments for the selected date and times? Y//

Enter 'Y' to reschedule these appointments
'N' to not reschedule: Y

3

Do you want to make the selected date and time slots unavailable? Answer 'Y' or 'N'

Do you want to make the selected date and time slots unavailable? Y
...SORRY, I'M WORKING AS FAST AS I CAN...

4

FIGURE 6-2

BLOCK CANCELLATION OF MEDICAL APPOINTMENTS

NOTES ON BLOCK CANCELLATION OF MEDICAL APPOINTMENTS OPTION

1. For an automated scheduling system these must be valid Time Slot Start Times. Any appointments which have a Time Scheduled that is in the time range you specify will be cancelled. Appointments that end during or after this time range, but have a Time Scheduled that is before the Start Time to Begin Cancelling, will not be cancelled. Appointments that have a Time Scheduled in the time range will be cancelled, even if the End of Appointment time is later than the Stop Time to End Cancelling.
2. This is a display of all the appointments that will be cancelled if we proceed.
3. We have chosen to reschedule, which will result in the appointment entries being filed in the To Be Scheduled file.
4. This question is only asked under an automated scheduling system.

6.5 Record Attended Appointments Option

You use this option to create or edit Appointment History records for attended appointments. The option is similar to and simpler than the Cancel Individual Medical Appointments option since it does not include options to reschedule. See Figure 6-3 for a discussion of the prompt sequence. In this example we create a new attended appointment for Janet Jackson at Branch Clinic Mare Island. We then edit that record to add the asbestos program. Also review Figure 6-1 for Notes 1, 2, and 6 through 10.

6.6 Exam Results Entry/Edit Option

This option allows you to edit attended appointments records and to enter program exam results. This option also files employee program qualification statuses and modifies enrollment data. If you change an Exam Status of "pending" or "incomplete" to "qualified" or "not qualified" the system will take one of the following actions:

- o If the employee is enrolled in the program, you will be prompted for the Date Next Exam. The system will have automatically modified the Date Next Exam in some instances. For one-time enrollments, you can delete the Date Next Exam which will also remove the program. In any case, you can modify the Date Next Exam for any reason, such as consistency with the employee's birthdate.
- o If the employee is not enrolled, or is enrolled for a one-time exam, and the exam is periodic, you will be asked if you want to enroll the employee in that program.

Figure 6-4 provides information on typical prompt sequences. In this example, for Janet Jackson at the Branch Clinic Mare Island we record results for the chromium, lead, and respiratory protection programs; correct the entered results; and handle enrollment issues.

Select CLINIC: HARE BRANCH CLINIC HARE ISLAND

EMPLOYEE WHO ATTENDED APPOINTMENT: J.J.

1 JACKSON, JANET JACKSON, JANET
F 567891 551111113 SHOP: 106 (MINS)
2 JONES, JUDY JONES, JUDY
F 433434 556789099 SHOP: 923 (MINS)

CHOOSE 1-2: 1 JACKSON, JANET

JACKSON, JANET DOB: SEP 29, 1971 OCC: 650690 INDUSTRIAL HYGIENE SHIFT: D

Select the Appointment attended from these Scheduled Appointments:

10-09-84 at 1100 OCCUPATIONAL EXPOSURE

08 CHROMIUM

04 LEAD

40 RESPIRATORY PROTECTION

...OK? YES// (YES)

ARE YOU ADDING A NEW MEDICAL APPOINTMENT HISTORY? Y (YES)

SCHEDULED OR UNSCHEDULED?: SCHEDULED//

CLINIC TIME IN: 1100// 1105

EMPLOYEE WHO ATTENDED APPOINTMENT: J.J.

1 JACKSON, JANET JACKSON, JANET
F 567891 551111113 SHOP: 106 (MINS)
2 JONES, JUDY JONES, JUDY
F 433434 556789099 SHOP: 923 (MINS)

CHOOSE 1-2: 1 JACKSON, JANET

JACKSON, JANET DOB: SEP 29, 1971 OCC: 650690 INDUSTRIAL HYGIENE SHIFT: D

Select the Appointment attended from these Scheduled Appointments:

APPOINTMENT not found.

If you want to enter/edit an attended APPOINTMENT record:

Select MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT: 2

ANSWER WITH MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT

DO YOU WANT THE ENTIRE MEDICAL APPOINTMENT HISTORY LIST? Y (YES)

CHOOSE FROM:

8-29-1984 ATTENDED at 900 SPECIAL REQUEST

02 ASBESTOS

04 LEAD

40 RESPIRATORY PROTECTION

10-9-1984 ATTENDED at 1105 OCCUPATIONAL EXPOSURE

08 CHROMIUM

04 LEAD

40 RESPIRATORY PROTECTION

YOU MAY ENTER A NEW MEDICAL APPOINTMENT HISTORY, IF YOU WISH

Select MEDICAL APPOINTMENT HISTORY DATE OF EXAM/APPOINTMENT: 10/9 OCT 9, 1984

08 CHROMIUM

ATTENDED at 1105 OCCUPATIONAL EXPOSURE

04 LEAD

40 RESPIRATORY PROTECTION

...OK? YES// (YES)

REASON FOR VISIT: OCCUPATIONAL EXPOSURE//

VISIT FOLLOWUP FLAG: -

SCHEDULED OR UNSCHEDULED?: SCHEDULED//

CLINIC TIME IN: 1105//

Select PROGRAM: 2

ANSWER WITH PROGRAM

CHOOSE FROM:

CHROMIUM

LEAD

RESPIRATORY PROTECTION

YOU MAY ENTER A NEW PROGRAM, IF YOU WISH

ONLY ONE ENTRY PER PROGRAM

ANSWER WITH MEDICAL PROGRAM NAME

DO YOU WANT THE ENTIRE 26-ENTRY MEDICAL PROGRAM LIST? -

Select PROGRAM: ASBESTOS

...OK? YES// (YES)

ENROLLMENT TYPE: 1// REQUIRED

REEXAM FREQUENCY: 60// 0

REASON FOR EXAM: CHANGE IN HS REQUIREMENTS// OCCUPATIONAL EXPOSURE

EXAM TYPE: P// 1 BASELINE

EXAM FOLLOWUP FLAG: -

Select PROGRAM: CHROMIUM

...OK? YES// (YES)

ENROLLMENT TYPE: PERSONAL//

REEXAM FREQUENCY: 0//

REASON FOR EXAM: OCCUPATIONAL EXPOSURE//

EXAM TYPE: BASELINE//

EXAM FOLLOWUP FLAG: -

Select PROGRAM: -

EMPLOYEE WHO ATTENDED APPOINTMENT: -

FIGURE 6-3

RECORD ATTENDED APPOINTMENTS

NOTES ON RECORD ATTENDED APPOINTMENTS OPTION

1. Since this entry was created from a scheduled record, the default is "scheduled". The default would be "unscheduled" if we had not selected an existing appointment and were creating an Appointment History record by direct entry. You can override the default as appropriate to the situation.
2. This field will be required for clinics that track cost accounting data. For these clinics, you should enter the actual arrival time of the employee at the clinic, since these data will be used to calculate the cost of clinic visits in terms of lost work time.
3. In this case, we are editing an existing record.
4. Notice that once we accept a program, we are not given the opportunity to delete it from the record. This is different from the handling of missed and cancelled appointments, so exercise care when you select a program. You may need to add programs if the employee is tested for unscheduled programs during the visit.
5. The defaults are from an existing enrollment. You can edit them as appropriate for the appointment history.
6. We have selected an existing appointment history program and could edit the fields shown.

Select CLINIC: HARE BRANCH CLINIC HARE ISLAND

EMPLOYEE FOR RESULTS ENTRY: JA-J JACKSON, JANET
F 547891 SS1111113 SHOP: 104 (MINS)

...OK? YES// (YES)

JACKSON, JANET DOB: SEP 29, 1971 OCC: 850490 INDUSTRIAL HYGIENE SHIFT: D
Select the Appointment for which you wish to enter results from the following:

- 1 8-29-1984 ATTENDED at 900SPECIAL REQUEST
02 ASBESTOS
04 LEAD
40 RESPIRATORY PROTECTION
- 2 10-9-1984 ATTENDED at 1105OCCUPATIONAL EXPOSURE
08 CHROMIUM
04 LEAD
40 RESPIRATORY PROTECTION

1

CHOOSE 1-2: 2 10-9-1984

REASON FOR VISIT: OCCUPATIONAL EXPOSURE//

VISIT FOLLOWUP FLAG: _

SCHEDULED OR UNSCHEDULED?: SCHEDULED//

CLINIC TIME IN: 1105//

CLINIC TIME OUT: 1145// 1200

2

Changes made to FREQUENCY, ENROLLMENT TYPE, and REASON FOR EXAM
will not change the corresponding enrollment values.

3

Use the enrollment option for changes.

Select PROGRAM: 2

ANSWER WITH PROGRAM

CHOOSE FROM:

CHROMIUM

LEAD

RESPIRATORY PROTECTION

Select PROGRAM: CHROMIUM

08

...OK? YES// (YES)

ENROLLMENT TYPE: PERSONAL//

REEXAM FREQUENCY: 0//

REASON FOR EXAM: OCCUPATIONAL EXPOSURE//

EXAM TYPE: BASELINE//

EXAM FOLLOWUP FLAG: _

EXAM STATUS: PENDING// 2 QUALIFIED

Current ENROLLMENT:

MEDICAL PROGRAM: CHROMIUM

DATE NEXT EXAM: SEP 29, 1984

DATE LAST EXAM: OCT 9, 1984

NEXT EXAM TYPE: BASELINE

DATE ENROLLED: JUL 30, 1984

ENROLLMENT STATUS: ENROLLED

ENROLLMENT TYPE: PERSONAL

REEXAM FREQUENCY: 0

REASON ENROLLED: OCCUPATIONAL EXPOSURE

REASON REMOVED: SET UP FOR SCHEDULING

OLD DATE NEXT: SEP 29, 1984

DATE LAST PERIODIC EXAM: OCT 9, 1984

EXPIRATION DATE BASIS: SEP 29, 1984

Deletion of DATE NEXT EXAM will REMOVE this one-time ENROLLMENT

4

DATE NEXT EXAM: SEP 29, 1984// 2

SURE YOU WANT TO DELETE? Y (YES)

REASON REMOVED: SET UP FOR SCHEDULING Replace ... With APPOINTMENT GIVEN

5

Replace _

APPOINTMENT GIVEN

The following is the current TO BE SCHEDULED entry:

6

PROGRAM TO BE SCHEDULED: CHROMIUM

ENROLLMENT TYPE: PERSONAL

REEXAM FREQUENCY: 0

REASON FOR EXAM: OCCUPATIONAL EXPOSURE

EXAM TYPE: BASELINE

EXAM FOLLOWUP FLAG: INITIAL

DATE EXPOSURE REPORTED: JUL 30, 1984

DATE FILED: OCT 22, 1984

WARNING: This Employee needs an exposure related exam for this Program

Do you want to DELETE this entry? N// 1

6

FIGURE 6-4

EXAM RESULTS ENTRY/EDIT

Select PROGRAM: CHROMIUM 08
 ...OK? YES// (YES)
 ENROLLMENT TYPE: PERSONAL//
 REEXAM FREQUENCY: 0//
 REASON FOR EXAM: OCCUPATIONAL EXPOSURE//
 EXAM TYPE: BASELINE//
 EXAM FOLLOWUP FLAG:
 EXAM STATUS: QUALIFIED// 1 INCOMPLETE (7)
 REASON INCOMPLETE:
 Required if EXAM STATUS is 'INCOMPLETE'; otherwise should be deleted
 CHOOSE FROM:
 1 NO RESULTS
 2 INCONCLUSIVE RESULTS
 3 EMPLOYEE LEFT
 4 SHOP RECALLED EMPLOYEE
 5 OPERATOR ABSENT
 6 MACHINE MALFUNCTION
 REASON INCOMPLETE: 2 INCONCLUSIVE RESULTS
 Select PROGRAM: 04 LEAD 04
 ...OK? YES// (YES)
 ENROLLMENT TYPE: PERSONAL//
 REEXAM FREQUENCY: 6//
 REASON FOR EXAM: OCCUPATIONAL EXPOSURE//
 EXAM TYPE: BASELINE//
 EXAM FOLLOWUP FLAG: INITIAL//
 EXAM STATUS: PENDING// NOT QUALIFIED
 MEDICAL PROGRAM: LEAD DATE LAST EXAM: OCT 9, 1984 NEXT EXAM TYPE: BASELINE DATE ENROLLED: OCT 8, 1984
 ENROLLMENT STATUS: REMOVED ENROLLMENT TYPE: PERSONAL REEXAM FREQUENCY: 0
 REASON ENROLLED: OCCUPATIONAL EXPOSURE DATE REMOVED: OCT 8, 1984 REASON REMOVED: SET UP FOR SCHEDULING
 OLD DATE NEXT: OCT 8, 1984 DATE LAST PERIODIC EXAM: OCT 9, 1984
 Do you want to ENROLL this Employee in this Program? Y (8)
 ENROLLMENT TYPE: PERSONAL//
 DATE NEXT EXAM: APR 1, 1987//
 Required field assigns: multiple entry not fully processed. (9)
 or field did not pass condition check.
 DATE NEXT EXAM: APR 1, 1987// 3/1/87 (MAR 1, 1987) (10)
 NEXT EXAM TYPE: BASELINE// 2 PERIODIC (11)
 The following is the current TO BE SCHEDULED entry:
 PROGRAM TO BE SCHEDULED: LEAD ENROLLMENT TYPE: PERSONAL REEXAM FREQUENCY: 0
 REASON FOR EXAM: OCCUPATIONAL EXPOSURE EXAM TYPE: BASELINE EXAM FOLLOWUP FLAG: INITIAL
 DATE EXPOSURE REPORTED: JUL 30, 1986 DATE FILED: OCT 22, 1986
 WARNING: This Employee needs an exposure related exam for this Program
 Do you want to DELETE this entry? N// 1
 Select PROGRAM: 40 RESPIRATORY PROTECTION 40
 ...OK? YES// (YES)
 ENROLLMENT TYPE: PERSONAL//
 REEXAM FREQUENCY: 12//
 REASON FOR EXAM: OCCUPATIONAL EXPOSURE//
 EXAM TYPE: BASELINE//
 EXAM FOLLOWUP FLAG: INITIAL//
 EXAM STATUS: PENDING// 0 QUALIFIED
 Current ENROLLMENT:
 MEDICAL PROGRAM: RESPIRATORY PROTECTION DATE NEXT EXAM: OCT 1, 1987 DATE LAST EXAM: OCT 9, 1984
 NEXT EXAM TYPE: PERIODIC DATE ENROLLED: JUL 28, 1984 ENROLLMENT STATUS: ENROLLED
 ENROLLMENT TYPE: REQUIRED REEXAM FREQUENCY: 12 REASON ENROLLED: CHANGE IN HS REQUIREMENTS
 DATE EXPOSURE REPORTED: OCT 8, 1984 OLD DATE NEXT: JUL 28, 1984 DATE LAST PERIODIC EXAM: OCT 9, 1984
 EXPIRATION DATE BASIS: OCT 1, 1987
 DATE NEXT EXAM: OCT 1, 1987// (12)
 Select PROGRAM:
 EMPLOYEE FOR RESULTS ENTRY:

FIGURE 6-4

EXAM RESULTS ENTRY/EDIT
 (Concluded)

NOTES ON EXAM RESULTS ENTRY/EDIT OPTION

1. You can only enter results for an existing Appointment History record. If the one you want is not listed, use the Record Attended Appointments Option to create it.
2. These times are required for clinics that track cost accounting data. Enter the actual time of arrival and departure.
3. This warning message is always displayed.
4. Since the employee has a one-time enrollment for this program, we are told how to remove it. If this had been a periodic exam, we would also have been asked if we wanted to enroll the employee.
5. This was the Reason Removed for a prior removal. We are replacing it with the current Reason Removed (Primer, Section 5.3).
6. As noted in Section 4.3 on removals, when no removal exam is to be done and there is an existing To Be Scheduled entry, the system asks if you want it to be deleted.
7. We entered the "not qualified" in error and are now changing it to "incomplete". Since we already deleted the To Be Scheduled entry above, we are not being asked if we want to replace it. Instead the program is simply filed in the To Be Scheduled file for a follow-up exam. The program removal is left as entered above.
8. Since the employee is removed from the program enrollment and the exam is periodic, we are asked if we want to do an enrollment.
9. The system has timed out on an existing entry before all data were processed so it will reprompt us.
10. Because the employee's birthmonth is September, we have altered the default date to correspond to a six-month frequency from the birthmonth.
11. Despite the fact that this is an enrollment with a future Date Next Exam, there is an existing To Be Scheduled entry; consequently, we are asked if we want to delete it.

NOTES ON EXAM RESULTS ENTRY/EDIT OPTION
(Concluded)

12. Since this is a periodic exam for a program with a periodic enrollment, we are prompted for a Date Next Exam. In this case the system has modified the Old Date Next by taking the appointment month and adding the enrollment reexamination frequency. If the Old Date Next had been greater than the appointment date, the Date Next Exam would have been the Old Date Next incremented by the enrollment reexamination frequency.

6.7 Appointment History Output Options

Table 6-1 describes the selection and sort criteria for which you will be prompted when using options that produce reports under the Update Appointment History Process; the prompt sequences for these options are self explanatory. See the Primer, Section 9.3, for information on responding to sort field prompts.

The Full Qualification Status Report option produces the Qualification Status Report for all agencies with all programs and training data. It can be produced on a regular basis using the Kernel's Taskmanager. This option can also be selected from the menu, in which case you will be prompted for device as shown in the Primer, Section 9.2.

TABLE 6-1
UPDATE APPOINTMENT HISTORY OUTPUT OPTIONS

OPTION	SELECT FIELDS	SORT FIELDS
Qualification Status Report	Agency Program, Training, or Both one or all Programs	Name
Appointment History Details	Employee Disposition range Program range Clinic Disposition Program range Clinic Program range	Date of Exam/Appointment Agency Agency Unit Employee Date of Exam/Appt. Agency Occupation Agency Unit Employee Date of Exam/Appt.
Appointment History Summary	Date of Exam/Appt range Agency	Shop
Performance Summary	Clinic Agency Date of Exam/Appt. range Schedule/Unscheduled/All	Program
Missed Appointments Report	Agency one or all Shops Date of Exam/Appt range	

TABLE 6-1
UPDATE APPOINTMENT HISTORY OUTPUT OPTIONS
(Concluded)

OPTION	SELECT FIELDS	SORT FIELDS
Cancellation Report	Agency one or all Shops Date of Exam/Appt range	
Cost Accounting Report	Agency one or all Shops Date of Exam/Appt range	
Full Qualification Status Report (no sort or selection)		

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